



USF Board of Trustees

Tuesday, March 6, 2018

USF Marshall Student Center Ballroom

9:30 AM – 12:30 PM

A G E N D A

- I. Call to Order and Comments** Chair Brian Lamb
- II. USF Sarasota-Manatee Faculty WOW! Presentation**
- III. New Business – Action Items (Minutes and Consent)**

- a. FL 101 – Approval of Minutes** Chair Lamb
 - [December 14, 2017](#)
 - [February 13, 2018](#)
 - [February 27, 2018](#)

- b. Consent Agenda (FL 102 – FL 111)** Chair Lamb

(BOT committee representatives may address approved items listed below. UFF representative may address any item that relates to terms and conditions of in-unit faculty employment.)

Board members should notify the Assistant Corporate Secretary of any items they wish to be pulled from the Consent Agenda 48 hours prior to the meeting. Items pulled will be discussed and voted on separately after the remainder of the consent agenda is approved.

Academic and Campus Environment Committee Approved Items

- FL 102 – [Approval of Tenure as a Condition of Employment, USF](#)**
- FL 103 – [Approval of Tenure as a Condition of Employment, USFSP](#)**
- FL 104 – [Approval of Tenure as a Condition of Employment, USFSM](#)**
- FL 105 – [Approval of Proposed B.S. Mathematics: Computational & Applied, USFSP](#)**
- FL 106 – [Approval of Proposed M.S. Advertising, USF](#)**
- FL 107 – [Approval of Proposed B.S. Integrated Public Relations & Advertising, USF](#)**
- FL 108 – [Approval of Proposed M.S. Learning Design & Technology, USF](#)**

FL 109 – [Approval of Proposed B.S. Risk Management, USFSM](#)

Governance Committee Approved Items

FL 110 – [Approval of DSO Regulations](#)

FL 111 – [Approval of BOT Operating Procedures](#)

c. New Business – Action Items

FL 112 – [Approval President’s 2018–2019 Contract](#)

Vice Chair Jordan Zimmerman

FL 113 – [Approval of USFSP Campus Board Member](#)

President Judy Genshaft

FL 114 – [Approval of Donor Bequest](#)

Senior Vice President Joel Momberg

IV. New Business – Informational Items

a. USF System Updates

1. USF System and [USF](#)

2. [USF St. Petersburg](#)

3. [USF Sarasota-Manatee](#)

President Genshaft
Interim Regional Chancellor Martin Tadlock
Regional Chancellor Karen Holbrook

V. BOT Roundtable Discussion

Chair Lamb

VI. Adjournment

Chair Lamb

Unofficial Minutes
USF Board of Trustees Regular Meeting
University of South Florida St. Petersburg Campus - Student Center Ballroom
Thursday, December 14, 2017

Chair Brian Lamb convened the regular meeting of the USF Board of Trustees at 8:00 a.m.

Chair Lamb welcomed everyone and thanked the leadership team at USF St. Petersburg for hosting the members of the Board of Trustees.

Chair Lamb wished everyone a happy holiday and announced that 2017 has been an outstanding year for the University of South Florida. He stated that “we have accomplished a few milestones and achieved goals thanks to the leadership of USF System President Judy Genshaft”.

Public Comments

Mr. James Ransom commented that there were plans to address the Board on issues of how USF spends money as it relates to African American business owners and other minority business enterprises. They are working with General Counsel on procedures for addressing the Board at future dates.

USF St. Petersburg Faculty WOW! Presentation.

Interim Regional Chancellor Martin Tadlock introduced and thanked members of the USF St. Petersburg Campus Board for their leadership. Those present included Mr. Bob Chiruti, Ms. Judy Mitchell, Mr. Lawrence Hamilton and Trustee Stephanie Goforth.

Interim Chancellor Tadlock also introduced faculty member Dr. Thomas Smith, a Professor of Political Science and Director of the USFSP Honors Program who gave brief comments surrounding his book *Human Rights and War Through Civilian Eyes* which reimagines the ethics of war from the standpoint of its collateral victims. Dr. Smith introduced three of his students who gave brief introductions of their Research. Elisa Duka (Global Business). “The Panama Paper and Money Laundering.” After completing her MBA, Elisa hopes to work for the U.S. Treasury Department investigating financial crimes. Sean Cornell (Finance). “Modern Piracy.” Sean (who is also a member of the sailing team) is applying to law schools to study maritime law. Zorana Knezevic (Anthropology). “Cultural Targeting in Syria.” Through an internship at the Smithsonian Institute, Zorana is developing an inventory of destroyed religious and cultural sites in Syria.

President Judy Genshaft called the roll with the following Trustees present:

Trustee Mike Carrere – By Phone
Trustee James Garey
Trustee Stephanie Goforth
Trustee Moneer Kheireddine – (by phone and in person)
Trustee Brian Lamb
Trustee Stan Levy
Trustee Hal Mullis
Trustee John Ramil
Trustee Byron Shinn
Trustee Nancy Watkins
Trustee Jordan Zimmerman

New Business – Action Items

FL 101 – Approval of Minutes – October 12, 2017

Trustee Hal Mullis moved for approval of the October 12th minutes with no additions with a second from Trustee Stephanie Goforth and the minutes were approved by the Board.

Consent Agenda – FL 102 – FL 104

FL 102 – Approval of Tenure as a Condition of Employment, USF
FL 103 – Approval of Degree Program Productivity Report and Proposed Termination
FL 104 – Approval of Expenditure Authorization Request

Trustee Stan Levy recommended approval on behalf of the ACE Committee.

Chair Brian Lamb recommended approval on behalf of the Finance committee.

There was no UFF Representative in attendance.

Trustee Hal Mullis moved for approval, it was seconded by Trustee John Ramil and approved by the Board unanimously.

New Business – Action Items

FL 105- Approval President Genshaft’s 2016-17 Performance Evaluations

Governance Committee Chair Jordan Zimmerman reported on the November 2nd Governance Committee meeting where they reviewed and discussed the President’s evaluation as well as the performance stipend. Vice Chair Zimmerman presented an overview of the committee’s evaluation and President Judy Genshaft’s performance self-evaluation of her four strategic goal areas.

- Goal 1 Research
- Goal 2 Revenue Generating Funds Including Fundraising

- Goal 3 Student Success
- Goal 4 Strategic Initiatives

Vice Chair Zimmerman stated that the past academic year had been truly extraordinary for the USF System achieving higher levels of student success and scholarly activities. He mentioned that this was President Judy Genshaft's seventeenth year serving as the University of South Florida System President and CEO, resulting in unprecedented results.

Highlights included:

USF continues its path to unprecedented levels of excellence as a leading higher education system, focused on supporting its students so that they can graduate on time with high quality degrees and minimal debt. The USF System maintains its upward momentum as a top research university in the State of Florida, the nation and globally. The USF System consistently performs top tier ranking for the SUS Performance Based Funding (PBF). USF Tampa continues to thrive as an Emerging Preeminent State Research University, in fact based on the 2017 laws of the State of Florida to be designated as a preeminent state research university, USF Tampa now meets 11 of the 12 required metrics.

Vice Chair Zimmerman recognized Sr. Vice President Joel Momberg and his team on an outstanding job with the *Unstoppable Campaign* passing the \$1 billion mark noting that USF is the 3rd university in the country to raise \$1 billion or greater for their endowment since the 1950. An additional \$80 million was raised during 2016-17.

The USF System was in the top tier for BOG performance based funding (PBF) receiving an additional non-recurring performance stipend.

For the fall 2016-17 the average GPA for incoming students was 4.08. The average SAT, 1266 and the ACT is 28 across the USF System.

USF has been ranked #6 in the country and #1 in the state of Florida to eliminate the achievement gap of African American students by the Educational Trust.

USF System was named the #1 producing institution in the US for Fulbright Scholars.

USF received attention for extraordinary record breaking numbers for Total Research Expenditures.

The Morsani College of Medicine has the highest medical college admission with the highest MCAT scores in the state of Florida for public and private universities.

President Judy Genshaft was recognized by ACE, receiving the 2017 Donna Shavlik Award for sustained leadership and commitment to women in higher education.

Areas still needing focus include:

Completing the fundraising efforts for the Morsani College of Medicine and USF Heart Institute downtown as well as the general fundraising efforts for USF Sarasota Manatee.

The regional institutions enhancing student success so that they are able to meet the performance base metric. Specific areas of focus are freshman retention rate, six year graduation rate and degrees awarded in areas of strategic emphasis.

The Governance Committee has the authority to award President Genshaft 70% of the stipend. On behalf of the committee, the Chair recommended that the Board approve the awarding of 96% of the authorized percentage or \$184,800.

A motion was made by Trustee Zimmerman and seconded by Trustee Stephanie Goforth to accept the Governance Committee's awarding of the stipend. Motion was approved unanimously.

Trustee Byron Shinn commented on alignment and communication as well as the strengths and weaknesses that USF Sarasota-Manatee campus must overcome as an organization. He also mentioned that a new full professor of accounting has been hired and commended the positive leadership of Dr. Terry Osborn during his term as Interim Chancellor at USFSM.

Chair Lamb thanked the committee and discussed the 30% discretionary given to the BOT Chair. His comments centered around the strategic focus on metrics, strong leadership and the direction in which the USF System is heading. The Chair shared that he talked to BOG leadership and local and state leaders. A few highlights included:

- Extending the brand of the USF System under President Judy Genshaft's leadership
- Relationships and key partnerships
- Interaction with the Board members – being transparent and willing to be held accountable.
- The professional relationship and interaction with the President helps with his role as Chair based on trust accountability and transparency.
- Continue to invest and focus on the regional campuses

Chair Lamb reported that he was awarding 95% of the discretionary stipend, or \$78,375 for the many milestone achievements and hard work that has been accomplished in order to accelerate the institution. Chair Lamb congratulated the President on the positive impact in which she has had on the University of South Florida System. Total performance stipend award was \$263,175.

President Judy Genshaft thanked everyone and expressed her appreciation on having the privilege to lead a great institution.

Trustee John Ramil congratulated Chair Brian Lamb on his role as Chair and President Genshaft on a great year, achieving the required goals. Trustee Ramil also thanked the Board members for their hard work and for challenging President Genshaft by tying a significant portion of her salary to an incentive stipend. He also congratulated Vice Chair Zimmerman on his role and hard work as Chair of the Governance Committee. He stated that he's done a super job leading an inclusive and transparent process.

Chair Lamb invited Senator Darryl Rouson who joined the meeting to address the USF Board of Trustees and the community.

Senator Darryl Rouson greeted everyone on behalf of the Florida Senate and welcomed everyone to Senate District 19. Senator Rouson is one of three senators serving in Pinellas County who support the aim, mission and efforts of the University of South Florida System. He mentioned that he is part of a delegation of 7 senators in the Tampa Bay region of which he is the only Democrat who serves both sides of the Bay. Senator Rouson thanked the Director of the internationally recognized USFSP Family Study Center, Dr. James McHale and doctoral student Lisa Negrini on their hard work and dedication. He has hopes of reoccurring funds for the center. The Senator thanked the Board, Chair Lamb and President Genshaft for the recent hire of Assistant Vice President for Supplier Diversity Terrie Daniel and the efforts of community leaders to enhance diversity among the minority business community.

FL 106 – Approval of the 2017-18 Strategic Plan for the Office of Supplier Diversity

Chair Lamb reminded the Board that the strategic plan for the Office of Supplier Diversity was discussed thoroughly with the Strategic Initiative committee and internal and external community constituents. He supports the plan and the decision to move forward. He called on AVP Terrie Daniel to present the item.

Ms. Daniel shared that the USF System is committed to utilizing diverse businesses in the procurement of goods, services, and construction contracts and continues to actively pursue diverse businesses for contracting opportunities and is committed to serving the university and surrounding business community through educational and community outreach activities.

She stated that the objective of the 2017-18 Strategic Plan is to outline how the Office of Supplier Diversity will lead the efforts in the implementation of the universities pro-active business strategy that provides suppliers equal access to sourcing and purchasing opportunities and encourages the utilization of diverse suppliers including women-, minority and veteran owned business enterprises.

A power point presentation was provided which highlighted issues on:

- Supplier Diversity A USF Business Imperative
- Opportunities and Challenges
- Organization Governance
- USF Supplier Diversity Advisory Committee
- Strategic Plan
- Strategic Plan - Annual Objectives
- Strategic Plan Strategies Already in Progress
- Strategic Plan Key Considerations
- National Minority Supplier Development Council
- Spend
- Disparity Studies
- Disparity Analysis

- Disparity Study – State of Florida
- Benchmarks – Florida (SEIs)

Chair Lamb commented that the USF Supplier Diversity Advisory Committee was put in place intentionally and was given authority to help quickly advance commitments that were made surrounding supplier diversity. The committee is made up of senior leaders at the university who periodically will provide feedback to the Board. The committee will assist with the advancement the strategy and add change to both culture and operations.

Chair Lamb stated that the program is committed to be aligned with the best model for supplier diversity. A future goal for the USF program is to strive for recognition and eventually be viewed as a model and success story.

FSU Director for Procurement Rosie Martin was introduced who made comments on her views relating to the Jaggaer Spend analytic tool. She stated that the analytic tool is what 70% of the Carnegie Research 1 universities use. It is dominate in the market for making efficient data driven decisions, dash boarding as well as tracking benchmarks. Director Martin formally used the Jaggaer Spend tool at the University of Illinois for 15 years and highly recommends it.

AVP Daniel thanked leadership for their support of implementing the tool and that a contract to move forward with the Jaggaer Spend tool is expected to be signed before the end of the year.

Numerous trustees including Stephanie Goforth and John Ramil congratulated AVP Daniel on her progress within a short length of time and her passion for her work. Trustee Ramil also commented concerning the State University System chart and questioned what can the USF System can gain from it. Chair Lamb predicts that USF will be a leader in the State University System of Florida as it relate to Supplier Diversity in the years to come. AVP Daniel shared that she has been contacted by many in the SUS System concerning Supplier Diversity and agrees that USF will be a leader and has a great deal of information to share with other universities across the state. Trustee Nancy Watkins encourages synergism on this statewide effort and using the same software as well as a consultant study for all 12 universities. She stated that USF is already leading the charge in numerous areas and suggests working with the Board of Governors.

Trustee Watkins also questioned true diversity and how it's measured (what does it look like and can we be more defined)? Vice Chair Zimmerman questioned how Diverse Supplier success is defined as there are many measures. Spend is one success factor of the program but there are many objectives that can be compared.

AVP Daniel is confident that the Jaggaer Spend tool, will assist in comparing the line level details and define opportunities within the Supplier Diversity business.

Chair Lamb reported that there are operating rhythms within these plans that will be considered for approval. For the first twelve months there will be updates on the Supplier Diversity program; and an opportunity for the Board members to provide feedback.

Trustee Byron Shinn suggested they embrace the word local within the Supplier Diversity plan.

Chair Lamb commented on a disparity study, marketing opportunities and the local Tampa Bay region being USF's local service territory. The Chair thanked Trustee Mullis on his work with the Strategic Initiatives Committee and asked for a motion. Trustee Byron Shinn moved for approval with a modification of adding the word "local" terminology to the plan. It was seconded by Trustee Jim Garey and the Supplier Diversity Strategies passed unanimously.

FL 107 – Approval of Operating Budget for USF Parking Facilities Revenue Bonds

Vice President for Business and Finance and Chief Financial Officer Nick Trivunovich provided brief introductory comments and is seeking the approval of a balanced budget for 2018 – 2019. VP Trivunovich commented that parking has a fairly healthy cash balance and is requesting to re-approach the Board with a long range plan by providing an indication of how the money will be spent approving parking on the Tampa campus and mentioned no increases have occurred over the past four years in parking rates. VP Trivunovich made a recommendation that the rates remain the same for 2018-19.

USF System Treasurer Fell Stubbs provided an update on USF parking facilities revenue bonds. USF has \$20,060,000 in outstanding parking revenue bonds which finances four parking garages on the Tampa campus.

The BOG Regulation historically required that universities with outstanding auxiliary revenue bonds annually submit a detailed operating budget to be approved by the Board of Governors at least ninety days preceding the beginning of the fiscal year. Chair Brian Lamb reported that Action Item FL 107 was not presented in a committee meeting. This is a new policy required by the Board of Governors that they bring the parking budget to the BOT for approval first. He also recommended that staff bring the parking strategy before the Finance Committee and back to the Board for an update at a later date. Chair Lamb also requested clarification that the Board has the ability to amend this budget should they find reason to after hearing the strategy.

Chair Lamb asked for a motion to approve the Operating Budget for USF Parking Facilities Revenue Bonds coming back to the Finance Committee with the Strategic Plan and the ability to amend the budget based on the findings.

Trustee Hal Mullis moved the motion and Trustee Stephanie Goforth seconded. FL 107 was approved unanimously.

Trustee Mullis shared that in recent facility presentations, it has been suggested that parking needs are going to change dramatically over the next four to six years on the Tampa Campus. He looks forward to the evolution of that strategy.

New Business - Informational Items

USF Tampa and the USF System

President Judy Genshaft provided an update on USF and the USF System. Highlights include:

The Gala celebrating USF reaching \$1 Billion was held on November 11th. Chief Diversity Officer Jose Hernandez has stepped down from his position for personal reasons so USFSP Campus Diversity Officer, Dr. Cecil Howard will be the Interim Associate Vice President and Chief Diversity Officer for the USF System.

President Genshaft was pleased to announce that Dr. Karen Holbrook will be the new Regional Chancellor for the USF Sarasota-Manatee campus. President Genshaft thanked College of Public Health Dean, Donna Petersen for her hard work for chairing the search committee.

She shared some of Dr. Holbrook credentials including degrees from the Universities of Wisconsin and Washington; she once served as:

- Vice President for Research at the University of Florida
- Provost at the University of Georgia
- President at The Ohio State University
- Sr. Vice President for Research and Innovation and for USF World
- Interim President at Embry-Riddle Aeronautical University

Dr. Holbrook's term will begin early January 2018. There will be a meet and greet for the community.

President Genshaft thanked Dr. Terry Osborn for his dedicated service while serving as Interim Regional Chancellor for USFSM for the past nine months.

Trustee Hal Mullis commented on the importance of finding the right people and thanked Dr. Karen Holbrook for accepting the position of Regional Chancellor for USFSM.

President Genshaft thanked Trustee Byron Shinn and the search committee members for their work in selecting a new Regional Chancellor.

Trustee Shinn thanked the President for being inclusive and transparent during the search process. He commented that this is phenomenal and will be a game changer for the USFSM campus.

Additionally, the USF System recently held seven commencement ceremonies graduating 4700 students across the USF System. Forty-nine states and over one hundred twenty nations were represented.

President Genshaft proudly announced that USF now ranks number one in the nation for Latino student success. She recognized and thanked Provost Ralph Wilcox, Vice President for Student Affairs and Student Success, Paul Dosal and their teams on their tremendous work and accomplishments.

President Genshaft gave recognition to Interim Regional Chancellor for USF St. Petersburg, Martin Tadlock on his phenomenal leadership.

A power point presentation was provided on USF Tampa Performance Update: (Please refer to the website)

- Student Access – Student Recruitment
- Recognitions
- Academic Programs
- Research
- Fundraising
- Facilities Leadership Talent – Critical Hires
- General

Trustee John Ramil commented that 15 years ago this Board set out as a goal to make USF a top 50 research University. We're doing it and serving an incredible cross section of society, unmatched in Florida and the Southeast. Trustee Ramil congratulated the President and her leadership team.

USF St. Petersburg

USFSP Interim Regional Chancellor Martin Tadlock expressed his appreciation in having the opportunity to represent the institution and provided a performance update.

Interim Chancellor Tadlock commented that they are laser focused on PBF, API's and student success. They have implemented activities and initiatives to help students be successful and complete their degrees at USFSP. (Please refer to the website)

- Student Access – New Student Recruitment Strategy Emerging Scholars Program
- Academic Programs – Progress of New Programs
- Research- Funding
- Fundraising
- The USF Unstoppable Campaign
- Facilities at the St. Petersburg
- Leadership Talent
- Success Stories Institutional Highlights
- Upcoming Events

Interim Chancellor Tadlock announced that Regional Vice Chancellor Holly Kicklighter is leaving January 5th. She is the Vice Chancellor for Enrollment Management Marketing and Communications.

Trustee Stephanie Goforth recognized USF Student Body President David Thompson for his hard work and achievements.

Interim Chancellor Tadlock reported that Student Body President David Thompson, members of the student organizations: Food Recovery Club and the Open Education Network; contributed close to \$30,000 to the CASA local Shelter in St. Petersburg.

Interim Chancellor Tadlock proudly reported that there is a 10% increase in the APR fall to fall rate which exceeds the goal at USFSP.

Trustee Goforth commented that the P3 project for USFSP will be addressed at the next Board of Trustees meeting.

USF Sarasota Manatee

USFSM Interim Regional Chancellor Osborn provided a power point presentation on the USF Sarasota-Manatee performance update. The power point highlighted issues on: (Please refer to the website)

- Student Access
- Student Success
- Academic Programs
- Research
- Fundraising
- Facilities at USF Sarasota Manatee campus
- Leadership Talent
- General

Interim Chancellor Osborn announced that the USFSM institution is ready to open the pre-Nursing portion of the program in fall 2018. They are focusing on student success, breakthrough research, community engagement, partnerships with LECOM and Stetson University; giving USFSM students a pathway to medical and law programs.

Vice Chair Zimmerman thanked Interim Regional Chancellor for his presentation and welcomed Dr. Karen Holbrook in her new leadership position as Regional Chancellor of USF Sarasota-Manatee.

BOT Roundtable Discussion

Trustee Mullis commented on Senator Darryl Rouson's comments concerning USF's success in Tallahassee and congratulated Mark Walsh and his team for a huge part of that success.

President Genshaft reported that USF football is off to Birmingham for a Bowl game in which we will win. Go Bulls!

Having no further business, Vice Chair Zimmerman adjourned the meeting at 10:50 a.m.

University of South Florida
Board of Trustees Meeting
Gibbons Alumni Center – Traditions Hall
Tuesday, February 13, 2018
Unofficial Minutes

Chair Brian Lamb convened the USF Board of Trustees meeting at 2:49pm.

The Chair asked President Genshaft to call the roll.

President Judy Genshaft called roll with the following Trustees Present:

Trustee Mike Carrere
Trustee James Garey
Trustee Stephanie Goforth
Trustee Oscar Horton – not in attendance
Trustee Moneer Kheireddine
Trustee Brian Lamb
Trustee Hal Mullis
Trustee Leslie Muma
Trustee John Ramil (via telephone)
Trustee Byron Shinn
Trustee Charles Tokarz
Trustee Nancy Watkins
Trustee Jordan Zimmerman – not in attendance

The Chair thanked everyone for their flexibility in attending this Board meeting between committee meetings. He informed the Board that with the shift in meeting dates their March meeting would not meet the deadline set by the Florida Board of Governors to receive the PBF Integrity Audit and Approval of Data Integrity Certification.

Consent Agenda FL 101

FL 101 – Acceptance of Performance Based Funding Data Integrity Audit & Approval of Data Integrity Certification

Audit & Compliance Committee Chair Watkins reported on behalf of the committee and expressed unanimous support in favor of approving the consent agenda.

Committee Chair Watkins made a motion for approval which was seconded by Trustee Shinn and approved unanimously by the Board.

Having no further business Chair Lamb adjourned the meeting at 2:51pm.

University of South Florida
Board of Trustees
Conference Call
Tuesday, February 27, 2018
Unofficial Minutes

Vice Chair Jordan Zimmerman convened the USF Board of Trustees conference call at 12:00pm.

Vice Chair Zimmerman thanked everyone for joining this conference call of the Board of Trustees to approve a naming prior to the formal announcement at USF St. Petersburg on March 1 and 11:30am.

Vice Chair Zimmerman then asked President Genshaft to call the roll.

President Judy Genshaft called roll with the following Trustees Present:

Trustee Mike Carrere (via telephone)
Trustee Stephanie Goforth (via telephone)
Trustee Oscar Horton (via telephone)
Trustee Hal Mullis (via telephone)
Trustee Leslie Muma (via telephone)
Trustee John Ramil (via telephone)
Trustee Nancy Watkins (via telephone)
Trustee Jordan Zimmerman (via telephone)

New Business – Action Items

FL 101 – Approval of the Merrill Lynch Wealth Management Center in the Lynn Pippenger Hall at the Kate Tiedemann College of Business at USFSP

Vice Chair Zimmerman asked President Genshaft to present the agenda item.

The President remarked on Bank of America Merrill Lynch's \$500,000.00 gift in support of the wealth management program at the USFSP Kate Tiedemann College of Business and recommended the naming of the Wealth Management Room in Lynn Pippenger Hall in honor of Bank of America Merrill Lynch as the Merrill Lynch Wealth Management Center.

Vice Chair Zimmerman asked USFSP Campus Board Chair, BOT Trustee and USFSP alumni Stephanie Goforth to make a motion to approve the naming resolution. Trustee Goforth put forth the motion with a second by Trustee Mullis. The BOT unanimously approved the resolution.

Having no further business Vice Chair Zimmerman adjourned the meeting at 12:04pm.

Agenda Item: FL 102

USF Board of Trustees
March 6, 2018

Issue: Tenure Nomination as a Condition of Employment

Proposed action: Approve Tenure as a Condition of Employment, USF Tampa

Executive Summary:

Administrators such as the President, Provost, Deans, Chairs, and senior faculty who are recruited to USF Tampa are normally awarded tenure as a condition of employment. These highly qualified individuals usually have earned tenure at their previous institutions, which makes them attractive candidates to USF. In order to attract them, USF must provide a package that is competitive with other nationally and internationally ranked institutions. Tenure upon appointment for qualified candidates, among other things, is a term and condition of the employment package that makes USF an institution of choice.

Financial Impact:

Strategic Goal(s) Item Supports:

USF Strategic Plan 2013-2018, Goal II

Committee Review Date:

Academic and Campus Environment Committee – February 13, 2018

Supporting Documentation Online (please circle): Yes **No**

[Tenure Nominations as a Condition of Employment](#)

USF System or Institution specific: USF Tampa

Prepared by: Dwayne Smith, Senior Vice Provost & Dean, Graduate Studies, 813-974-2267



MEMORANDUM

DATE: March 6, 2018

TO: Brian Lamb, Chair

FROM: Judy Genshaft
President

SUBJECT: Tenure as a Condition of Employment Nominations, USF Tampa

I am requesting approval by the USF Board of Trustees of the enclosed Tenure as a Condition of Employment Nominations at USF Tampa. In nominating these faculty members for tenure, I certify that the requirements and conditions contained in USF Regulations, Policies, and Procedures for the granting of tenure have been met. I am satisfied that the nominees will make a significant professional contribution to USF Tampa and the academic community.

Enclosures

Faculty Nominations for Tenure as a Condition of Employment, USF-Tampa
USF Board of Trustees Meeting – March 6, 2018

<u>College</u>	<u>Name</u>	<u>Rank</u>	<u>Department/ School</u>	<u>Degree of Effort*</u>	<u>Previous Institution</u>	<u>Tenure at Previous Institution</u>
Arts & Sciences	RuthAnn Atchley	Professor	Psychology	1.0	University of Kansas	Yes
Education	Robert Knoeppel	Professor	Leadership, Counseling, Adult, Career and Higher Education	1.0	Clemson University	Yes
Morsani College of Medicine	Kami Kim	Professor	Internal Medicine	1.0	Albert Einstein College of Medicine in Bronx, NY	Yes
Morsani College of Medicine	Xin Zhang	Professor	Molecular Pharmacology and Physiology	1.0	University of Oklahoma Health Science Center, Oklahoma City, OK	Yes

*If less than 1.0 FTE

University of South Florida
Tenure Nominations as a Condition of Employment

1

Arts & Sciences

RuthAnn Atchley, Ph.D.

Dr. RuthAnn Atchley will join the faculty of the Department of Psychology as Professor in Fall of 2018. She received a Ph.D. from University of California, Riverside, in 1997. After two years of post-doctoral education at University of Illinois, Urbana-Champaign, she obtained a position of an Assistant Professor in the Department of Psychology at University of Kansas (KU) in 1998. She was promoted to Associate Professor in 2006 and then to Professor in 2013. She is currently Assistant Chancellor of KU, Edwards Campus since 2017.

Dr. Atchley is author or co-author of one book, three editor journals, and some 40 articles. She has received one award for her scholarship and five teaching/service awards. Since 2007, Dr. Atchley has served as PI or co-investigator on international, national, institutional, and local grants totaling approximately \$6M.

Dr. Atchley served as the President of Faculty Senate (2006-2007) and Chair of Psychology Department (2009-2017) at KU. Outside KU, she also served as the Co-Director of the TENNET conference (Theoretical and Experimental Neuroscience) and on the Suicide Prevention Interdisciplinary Leadership Team (2012-2017).

The tenured faculty and chair of the Department of Psychology recommend Dr. Atchley for tenure and appointment at the rank of Professor. Eric Eisenberg, Dean of the College of Arts & Sciences, along with Provost Ralph Wilcox and President Judy Genshaft, fully concur with this recommendation for tenure upon appointment.

**University of South Florida
Tenure Nominations as a Condition of Employment**

2

Education

Robert Knoeppel, Ph.D.

Dr. Robert (Rob) Knoeppel will join the University of South Florida in late May 2018 as Professor and Dean of the College of Education. He will be coming to USF from Clemson University where he is a tenured Professor and chair of the Department of Educational and Organizational Leadership Development. Having received a bachelor's degree from the University of North Carolina at Chapel Hill and a master's degree from the University of Virginia, he pursued a career as a guidance director and school counselor at the elementary, middle, and high school levels. Dr. Knoeppel then obtained his Ph.D. from the University of Virginia and served on the faculty at the University of Kentucky before moving to Clemson.

Dr. Knoeppel has published 26 refereed journal articles, four book chapters, and four technical reports. His works have appeared in such journals as Education Policy Analysis Archives, Educational Studies, International Journal of Leadership in Education, Journal of Education Finance, and Educational Policy. In addition, he has made 74 refereed presentations at national and international professional conferences. He serves as associate chair of the National Education Finance Association, and is on the editorial boards of the academic publications Journal of Education Finance and Educational Considerations. He has received many awards for his teaching and research, including the National Education Finance Conference Distinguished Research and Practice Fellow Award, the Educational Considerations Scholarly Paper Award, and the College of Education (Clemson University) Excellence in Teaching Award.

The faculty and chair of the Department of Leadership, Counseling, Adult, Career and Higher Education, as well as Interim Dean Roger Brindley, have endorsed the hiring of Dr. Knoeppel as a Professor with tenure. President Judy Genshaft and Provost Ralph Wilcox concur with this recommendation.

**University of South Florida
Tenure Nominations as a Condition of Employment**

3

Morsani College of Medicine

Kami Kim, M.D.

Dr. Kami Kim joined the faculty of the Department of Internal Medicine in the Fall of 2017 as a Professor. Dr. Kim came to USF from Albert Einstein College of Medicine, Bronx, NY where she held the position of Professor with tenure. She has had a long and distinguished career as a teacher, leader, and independent researcher. She obtained her M.D. from Columbia College of Physicians and Surgeons, and was a Fellow in Infectious Disease at University of California San Francisco and San Francisco General Hospital. She was also a post-doctoral fellow in the laboratory of John Boothroyd at Stanford, where she began in earnest the study of parasitology at the basic and translational levels. She became an Assistant Professor at Einstein in 1995, and a Professor in 2007.

Dr. Kim has an internationally recognized research program in the epigenomics of *Toxoplasma gondii* infection, the molecular basis of HIV predisposing to cerebral malaria, and malaria drug discovery. She has had multiple NIH grants over the last two decades including being the current PI on a training grant, and three R01s, and has two R01 grants under review. She has published 84 primary research articles and is the author of 36 review articles, and numerous book chapters. In addition, she is highly sought as a scientific reviewer for NIH and medical journals. Her primary responsibility at the Morsani College of Medicine will be research, as well as some attending duties in Infectious Diseases. As a physician scientist, she will enrich the programmatic goal to train physicians in scientific investigation.

The Morsani College of Medicine Appointment, Promotion and Tenure Committee, and the chair of the Department of Internal Medicine recommend Dr. Kim for tenure at the rank of Professor. Dr. Charles J. Lockwood, Senior Vice President of USF Health, and Dean of the Morsani College of Medicine along with Provost Ralph Wilcox and President Judy Genshaft, concur with this recommendation for tenure upon appointment.

**University of South Florida
Tenure Nominations as a Condition of Employment**

4

Morsani College of Medicine

Xin Zhang, Ph.D.

Dr. Xin Zhang joined the faculty of the Department of Molecular Pharmacology and Physiology in December 2017 as a Professor. He comes to USF from the Stephenson Cancer Center and Department of Physiology, University of Oklahoma Health Science Center, Oklahoma City, OK where he served as a Professor with tenure. He will focus his efforts on teaching medical students, residents, and fellows, and will continue his research in the area of vascular development, angiogenesis and tumor metastasis, focusing on cell adhesion regulation and its role in cancer biology.

Dr. Zhang is an outstanding scientist, scholar, and teacher. He currently serves as the PI on two projects; one a \$1.5 million NIH R01 grant, and has two pending NIH grant proposals in review totaling more than \$3.2 million. He has more than 53 refereed journals, and 14 reviews/book chapters. He has mentored nearly 100 medical students, residents, and postdoctoral fellows, and has been an invited speaker at many national and international conferences. He serves on the editorial board for several national and international scientific periodicals.

Dr. Zhang earned a Bachelor of Medicine degree at the Wuhan University of School of Medicine, China, in 1985. He then earned a Master of Medicine degree at the Huazhong University of Science and Technology Tongji Medical College, China, in 1998, and a Doctor of Medicine degree at the University of Geneva School of Medicine, Switzerland, in 1992.

The Morsani College of Medicine Appointment, Promotion and Tenure Committee, and the chair of the Department of Cardiovascular Sciences recommend Dr. Zhang for tenure at the rank of Professor. Dr. Charles J. Lockwood, Senior Vice President of USF Health, and Dean of the Morsani College of Medicine along with Provost Ralph Wilcox and President Judy Genshaft, concur with this recommendation for tenure upon appointment.

Agenda Item: FL 103

USF Board of Trustees
March 6, 2018

Issue: Faculty Nomination for Tenure upon Condition of Employment

Proposed action: Approve Tenure as a Condition of Employment for USF St. Petersburg

Executive Summary:

USF St. Petersburg (USFSP) administrators such as the Regional Chancellor, Regional Vice Chancellors, Deans, and senior faculty are commonly awarded tenure as a condition of employment. Typically, these highly accomplished and qualified individuals have earned tenure at their previous institution(s), which makes them desirable candidates to USFSP. In order to attract these candidates, USFSP must provide a package that is competitive with other nationally and internationally ranked institutions. Tenure upon appointment, among other things, is a term and condition of the employment package that makes USFSP an institution of choice.

Financial Impact:

Faculty granted tenure only will not receive a monetary award.

Strategic Goal(s) Item Supports: USF SP Strategic Plan 2014-2019 – Goal 3
USF Strategic Plan 2013-18 – Goal 1
BOT Committee Review Date: Academic and Campus Environment Committee
February 13, 2018

Supporting Documentation Online (please circle): Yes No
[Tenure Packet](#)

USF System or Institution specific: USF St. Petersburg

Prepared by: Martin Tadlock, Interim Regional Chancellor, USF St. Petersburg



MEMORANDUM

DATE: March 6, 2018

TO: Brian Lamb, Chair

FROM: Judy Genshaft
President

SUBJECT: Tenure as a Condition of Employment Nominations, USF St. Petersburg

I am requesting approval by the USF Board of Trustees of the enclosed Tenure as a Condition of Employment Nominations at USF St. Petersburg. In nominating these faculty members for tenure, I certify that the requirements and conditions contained in USF Regulations, Policies, and Procedures for the granting of tenure have been met. I am satisfied that the nominees will make a significant professional contribution to USF St. Petersburg and the academic community.

Enclosures

Faculty Nominations for Tenure as a Condition of Employment, USF-Tampa
USF Board of Trustees Meeting – March 6, 2018

<u>College</u>	<u>Name</u>	<u>Rank</u>	<u>Department/ School</u>	<u>Degree of Effort*</u>	<u>Previous Institution</u>	<u>Tenure at Previous Institution</u>
USFSP Arts and Sciences	Magali Michael	Dean	College of Arts and Sciences	1.0	Duquesne University	Yes

*If less than 1.0 FTE

MAGALI CORNIER MICHAEL

Magali Cornier Michael is currently Professor of English and Associate Dean of the McAnulty College and Graduate School of Liberal Arts at Duquesne University in Pittsburgh, Pennsylvania. She earned her Ph.D. at Emory University in 1990. Dr. Michael has published three books to date: *Narrative Innovation in 9/11 Fiction* (2014, Brill/Rodopi Press), *New Visions of Community in Contemporary American Fiction: Tan, Kingsolver, Castillo, Morrison* (2006, University of Iowa Press), and *Feminism and the Postmodern Impulse: Post-World War II Fiction* (1996, State University of New York Press). Currently, she is editing a collection of essays titled *Twenty-First-Century British Fiction and the City*, for which she has written the introduction and one of the chapters (forthcoming 2018, Palgrave Mcmillan Press). In addition, she has published articles and book chapters on the work of Diana Abu-Jaber, Margaret Atwood, Angela Carter, Don DeLillo, Jonathan Safran Foer, John Fowles, Doris Lessing, Ian McEwan, Toni Morrison, Grace Nichols, D.M. Thomas, and Virginia Woolf. She also regularly presents papers at international and national conferences, such as the Narrative Conference and the American Literature Association Conference, and has reviewed manuscripts for numerous academic literary journals. On the teaching front, she has taught a large number of courses at all levels (from freshman to doctoral level courses), especially in the areas of post-World War II literature, women's literature, literary theory, and creative writing. In her work with doctoral students, she has directed eleven dissertations to completion and has one currently in progress. Moreover, she has held the following administrative positions: Associate Dean (2015-present), English Department Chair (2017-13), Co-Founder (1997-99) and Co-Director of Women's & Gender Studies (2003-07), and Director of Graduate Studies for English (1997-2001, 2014).

Agenda Item: FL 104

USF Board of Trustees
March 6, 2018

Issue: Tenure Nomination as a Condition of Employment

Proposed action: Approve Tenure as a Condition of Employment for USF Sarasota-Manatee

Background information:

USF Sarasota-Manatee (USFSM) administrators such as the Regional Chancellor, Regional Vice Chancellors, Deans, and senior faculty are commonly awarded tenure as a condition of employment. Typically, these highly accomplished and qualified individuals have earned tenure at their previous institution(s), which makes them desirable candidates to USFSM. In order to attract them, USFSM must provide a package that is competitive with other nationally and internationally ranked institutions. Tenure upon appointment, among other things, is a term and condition of the employment package that makes USFSM an institution of choice.

Strategic Goal(s) Item Supports:

USF Sarasota-Manatee Strategic Plan 2015-2020, Goals 4 and 5
USF Strategic Plan 2013-2018, Goal 1

Workgroup Review Date:

Academic and Campus Environment Committee – February 13, 2018

Supporting Documentation Online (please circle): **Yes** **No**

- [Memorandum to Brian Lamb, Chair, USF Board of Trustees](#)
- [Tenure Nomination as a Condition of Employment](#)
- [Faculty Profile](#)

USF System or Institution specific:

USF Sarasota-Manatee

Prepared by: Karen Holbrook, Regional Chancellor, 941-359-4340



MEMORANDUM

DATE: March 6, 2018
TO: Brian Lamb, Chair
FROM: Judy Gershaft, President
SUBJECT: Faculty Nominations for Tenure, USF Sarasota-Manatee

I am requesting that the enclosed Faculty Nomination for Tenure, USF Sarasota-Manatee submitted to the USF Board of Trustees be approved. In nominating this faculty member for tenure, I certify that the requirements and conditions contained in USF Regulations, Policies, and Procedures for the granting of tenure have been met. I am satisfied that the nominee will make a significant professional contribution to USF Sarasota-Manatee and the academic community.

Nominee for tenure: Madeline Domino, Accounting

Thank you for your consideration of this request. Please call me if you have any questions.


Judy Gershaft, President


Date

Enclosures

**Faculty Nominations for Tenure as Condition of Employment, USF Sarasota-Manatee
USF Board of Trustees Meeting – March 6, 2018**

<u>College</u>	<u>Name</u>	<u>Rank Upon Tenure</u>	<u>Discipline</u>	<u>Degree of Effort*</u>	<u>Previous Institution</u>	<u>Tenure at Previous Institution</u>
College of Business	Madeline Domino	Associate Professor	Accounting	1.0 FTE	Mercer University	Tenured Associate Professor

* If Less than 1.0 FTE

**University of South Florida Sarasota-Manatee
Tenure as a Condition of Employment
College of Business**

Dr. Madeline Ann Domino will join the College of Business at USFSM as an Associate Professor of Accounting in August 2018. Dr. Domino is currently a tenured, Associate Professor at Mercer University and has been a member of the faculty at the Mercer University since 2013. Prior to her time at Mercer, she was an Assistant Professor of Accounting at the J. Mack Robinson College of Business at Georgia State University from 2008 to 2013, and a visiting faculty member at the University of Central Florida from 2006 to 2008. Dr. Domino holds a Ph.D. in Management Information Systems with a minor in Accounting/Auditing and an M.B.A. in Accounting/Management from the University of South Florida. She holds a B.S. in Accounting from Florida State University.

Dr. Domino has taught graduate courses in Accounting for Control, Forensic Accounting, Financial Statement and Business Analysis, Accounting Concepts for Managers, and Management of Information System Functions at the graduate level. At the undergraduate level, she has taught courses in Accounting Information Systems, Intermediate Financial Accounting, Auditing, Fraud Examination, and introductory accounting courses. Prior to her academic career, Dr. Domino held senior management positions with Bank of America and Sun Microsystems and was an auditor for PricewaterhouseCoopers.

Dr. Domino's research has so far yielded nine articles in published in peer-reviewed journals and fifteen conference proceedings/presentations. Dr. Domino's research has been cited 72 times and her publication record was recognized while she was a faculty member at Georgia State University.

Dr. Domino received recognition for her research accomplishments while at Georgia State and was recognized by accounting graduates at Georgia State as a faculty member who made a significant difference and positive impact.

Agenda Item: FL 105

USF Board of Trustees
March 6, 2018

Issue: B.S. in Mathematics: Computational & Applied – CIP 27.0304

Proposed action: Approval

Executive Summary: The Mathematics: Computational & Applied degree program at University of South Florida St. Petersburg will prepare graduates for careers in mathematics, statistics, data analytics, and fields which rely on employees with excellent quantitative skills or for entry into post baccalaureate degree programs in mathematics or statistics. Graduates may be employed in a wide array of industries, including aerospace, banking, computing, consulting, data analytics, data sciences, electronics, energy, finance, government, medical device development, transportation, and many others.

Financial Impact: Resources needed for this program are dominated by the need for new full-time, permanent faculty lines. These faculty lines will be supported by anticipated performance-based funding, current base funding, or by funds released from internal reallocation of existing resources. No additional labs or physical facilities are needed.

Costs in year one are dominated by existing and anticipated new mathematics and statistics faculty salaries and benefits. Two new faculty lines have been granted: one full professor and one assistant professor in mathematics areas. Additional costs related to enrollment growth will be incurred for personnel services (adjunct faculty members) and library services.

Strategic Goal(s) Item Supports:

- GOAL 1. USF will produce well educated, highly skilled global citizens through its continuing commitment to student success.
- GOAL 2. USF will generate new knowledge and solve problems through high-quality research and innovation to change lives, improve health, and foster positive societal change.
- GOAL 3. USF will be a highly effective, major economic engine, creating new partnerships to build a strong and sustainable future for Florida in the global economy.

BOT Committee Review Date: ACE February 13, 2018

Supporting Documentation Online (please circle): Yes No

[BOG Proposal](#)

USF System or Institution specific: USF St. Petersburg

Prepared by: Kathleen Gibson-Dee, Ph.D., Instructor, USFSP College of Arts and Sciences and Director, USFSP Quality Enhancement Plan

Board of Governors, State University System of Florida

Request to Offer a New Degree Program

(Please do not revise this proposal format without prior approval from Board staff)

University of South Florida St. Petersburg	Fall, 2018
University Submitting Proposal	Proposed Implementation Term
College Of Arts and Sciences	Biological Sciences/ Mathematics and Statistics
Name of College(s) or School(s)	Name of Department(s)/ Division(s)
Mathematics	Bachelor of Science in Mathematics: Computational & Applied
Academic Specialty or Field	Complete Name of Degree
27.0304	
Proposed CIP Code	

The submission of this proposal constitutes a commitment by the university that, if the proposal is approved, the necessary financial resources and the criteria for establishing new programs have been met prior to the initiation of the program.

Date Approved by the University Board of Trustees	President	Date
Signature of Chair, Board of Trustees	Date	Vice President for Academic Affairs
		Date

Provide headcount (HC) and full-time equivalent (FTE) student estimates of majors for Years 1 through 5. HC and FTE estimates should be identical to those in Table 1 in Appendix A. Indicate the program costs for the first and the fifth years of implementation as shown in the appropriate columns in Table 2 in Appendix A. Calculate an Educational and General (E&G) cost per FTE for Years 1 and 5 (Total E&G divided by FTE).

Implementation Timeframe	Projected Enrollment (From Table 1)		Projected Program Costs (From Table 2)				
	HC	FTE	E&G Cost per FTE	E&G Funds	Contract & Grants Funds	Auxiliary Funds	Total Cost
Year 1	22	17	\$23,527	\$399,962	\$0	\$0	\$399,962
Year 2	41	30.75					
Year 3	55	41.25					
Year 4	78	58.5					
Year 5	97	72.75	\$8,957	\$651,599	\$0	\$0	\$651,599

Note: This outline and the questions pertaining to each section must be reproduced within the body of the proposal to ensure that all sections have been satisfactorily addressed. Tables 1 through 4 are to be included as Appendix A and not reproduced within the body of the proposals because this often causes errors in the automatic calculations.

CONTENTS

INTRODUCTION4

 I. Program Description And Relationship To System-Level Goals.....4

INSTITUTIONAL AND STATE LEVEL ACCOUNTABILITY6

 II. Need And Demand6

 III. Budget10

 IV. Projected Benefit Of The Program To The University, Local Community, And State.....12

 V. Access And Articulation – Bachelor’s Degrees Only.....12

INSTITUTIONAL READINESS.....14

 VI. Related Institutional Mission And Strength14

 VII. Program Quality Indicators - Reviews And Accreditation.....17

 VIII. Curriculum17

 IX. Faculty Participation24

 X. Non-Faculty Resources28

APPENDIX A: Required Tables

APPENDIX B: Signature Of The Equal Opportunity Officer And The Library Director

APPENDIX C: Program Assessment

APPENDIX D: Course Catalog (Proposed)

APPENDIX E: Market Demand For Bachelor’s-Level Computational And Applied Mathematics
Programming: Analysis Of Southern Florida Employer Demand

APPENDIX F: Faculty Curriculum Vitae

APPENDIX G: Letters of Support

LIST OF TABLES

Table 1: Undergraduate enrollment is all CIP 27.xxxx in SUS by year8

Table 2: Bachelor's degrees awarded in CIP 27.xxxx in SUS by academic year8

Table 3: Population demographics for Pinellas County and USFSP9

Table 4: Planning Process16

Table 5: Events Leading to Implementation17

Table 1-A: Projected headcount from potential sources (Required by Template)..... 34

Table 2-A: Projected costs and funding sources (Required by Template 35

Table 3-A: Anticipated reallocation of education & general funds (Required by Template) 36

Table 4-A: Anticipated faculty participation (Required by Template) 37

Introduction

I. Program Description and Relationship to System-Level Goals

- A. Briefly describe within a few paragraphs the degree program under consideration, including (a) level; (b) emphases, including majors, concentrations, tracks, or specializations; (c) total number of credit hours; and (d) overall purpose, including examples of employment or education opportunities that may be available to program graduates.**

The Mathematics: Computational & Applied degree program at University of South Florida St. Petersburg will prepare graduates for careers in mathematics, statistics, data analytics, and fields which rely on workers with excellent quantitative skills or for entry into post baccalaureate degrees in related programs in mathematics or statistics. Graduates may be employed in a wide array of industries including aerospace, banking, computing, consulting, data analytics, data sciences, electronics, energy, finance, government, medical device development, transportation, and many others.

Program Summary:

(a) B. S. degree in Mathematics: Computational & Applied (CIP 27.0304).

(b) To earn this degree, students must complete all prerequisite and core courses with a grade of C (not C-) or better, participate in a senior capstone course, complete an internship, and complete a concentration in the program. Initially two concentrations are being proposed: Mathematics and Data Analytics & Business Intelligence. Future concentrations may include Data Sciences, Computation Biology, and others, as market need, faculty expertise, and student interest suggest.

(c) This degree can be completed by successfully completing 120 credit hours, including all university and College of Arts and Sciences requirements, prerequisite courses, core curriculum, concentration, and other requirements for this major as listed above.

(d) The purpose of this program is to prepare graduates for careers in mathematics, data analytics, and many fields that require excellence in quantitative reasoning and ability. Nationally, about 1 million new professionals in STEM fields will be needed in the US by 2022 to support economic growth and maintain global pre-eminence in these fields. In math alone, nearly 43,000 new jobs are anticipated, reflecting a 28% growth rate. Median salary for mathematics professionals 2015 was \$81,360, which exceeds the national median wage by over \$36,000.

The State of Florida Workforce Innovation and Opportunity Act highlights mathematical and reasoning skills, problem solving ability, information ordering and critical thinking, as being among the most needed skills, abilities, and knowledge identified for new and emerging industries as well as in Florida's most rapidly growing occupations. Mathematics is among the top three occupations in Florida with highest rates of job growth.

Graduates of this proposed program may be employed in a wide array of industries including aerospace, banking, computing, consulting, data analytics, electronics, energy, finance, government, medical device development, transportation, and many others or pursue graduate degrees in related programs in mathematics.

- B. Please provide the date when the pre-proposal was presented to CAVP (Council of Academic Vice Presidents) Academic Program Coordination review group. Identify any concerns that the CAVP review group raised with the pre-proposed program and provide a brief narrative explaining how each of these concerns has been or is being addressed.**

The pre-proposal was presented and approved on April 14, 2017 to the CAVP (Council of Academic Vice Presidents) Academic Program Coordination review group. No concerns were identified.

- C. If this is a doctoral level program please include the external consultant's report at the end of the proposal as Appendix D. Please provide a few highlights from the report and describe ways in which the report affected the approval process at the university.**

Not Applicable. This is not a doctoral level program.

- D. Describe how the proposed program is consistent with the current State University System (SUS) Strategic Planning Goals. Identify which specific goals the program will directly support and which goals the program will indirectly support (see link to the SUS Strategic Plan on [the resource page for new program proposal](#)).**

Students interested in careers in fields requiring computational and applied mathematics skills currently may only pursue undergraduate degrees in general mathematics (CIP 27.0101) or general statistics (CIP 27.0501) at SUS institutions. Both of these areas are distinct from computational and applied mathematics (CIP 27.0304), so there is a critical need for this program, which is currently unavailable in the SUS. Students who intend to seek advanced degrees in applied mathematics, currently offered in the SUS, will also be likely to enroll in this undergraduate program. USF Tampa offers Bachelor of Arts degrees in mathematical programs, but not Bachelor of Science degrees.

The Florida SUS Goals directly supported by this program are:

- Increase Degree Productivity and Program Efficiency;
- Increase the Number of Degrees Awarded within Programs of Strategic Emphasis;
- Increase Research Activity and Attract More External Funding;
- Strengthen Quality & Recognition of Commitment to Community and Business Engagement;
- Increase Community and Business Engagement; and
- Increase Community and Business Workforce.

The Florida SUS Goals indirectly supported by this program are:

- Strengthen Quality and Reputation of Academic Programs and Universities;
- Strengthen Quality and Reputation of Scholarship, Research, and Innovation; and
- Increase Commercialization Activity.

STEM programs are included among the areas of SUS strategic emphasis. This proposed program in computational and applied mathematics is foundational to many STEM disciplines, increases the number of majors offered at USFSP, within the USF system, and within the SUS. This program enhances the prestige and reputation of USFSP and the USF system by providing a recognizable and highly valued discipline to our inventory. Critical workforce and economic development needs are served by graduates with the knowledge, skills, and abilities inherent in this computational and applied mathematics program.

- E. If the program is to be included in a category within the Programs of Strategic Emphasis as described in the SUS Strategic Plan, please indicate the category and the justification for inclusion.**

The Programs of Strategic Emphasis Categories:

1. Critical Workforce:
 - Education
 - Health
 - Gap Analysis
2. Economic Development:
 - Global Competitiveness
3. Science, Technology, Engineering, and Math (STEM)

Please see the Programs of Strategic Emphasis (PSE) methodology for additional explanations on program inclusion criteria at [the resource page for new program proposal](#).

This proposed program in Mathematics: Computational & Applied is included in the Science, Technology, Engineering, and Math category of Programs of Strategic Emphasis as described in the SUS Strategic Plan. Within the SUS, no other institutions offer this program at the undergraduate level. Critical workforce and economic development needs will be served by graduates with the knowledge, skills, and abilities inherent in this Mathematics: Computational & Applied program.

F. Identify any established or planned educational sites at which the program is expected to be offered and indicate whether it will be offered only at sites other than the main campus.

With the exception of internships, this program will be offered only on the USFSP campus or through the USFSP campus via online courses (for the Data Analytics & Business Intelligence concentration).

Institutional and State Level Accountability

II. Need and Demand

- A. Need: Describe national, state, and/or local data that support the need for more people to be prepared in this program at this level. Reference national, state, and/or local plans or reports that support the need for this program and requests for the proposed program which have emanated from a perceived need by agencies or industries in your service area. Cite any specific need for research and service that the program would fulfill.**

According to the President's Council of Advisors of Science and Technology (2012), an additional 1 million professionals will be needed for the US to maintain leadership in sciences, technology, engineering, and mathematics. These professional skills are critical to US industries that must adapt to meet the ever-changing demands of the global marketplace (National Governors Association Center for Best Practices, 2011).

Market research was conducted by EAB to ascertain the need and demand for the proposed program in the region, state, and nation. The complete market analysis report is provided in Appendix E.

To assess demand for graduates with a bachelor's degree in Mathematics: Computational & Applied, data were collected from online job postings from August 2016 until July 2017. Both national and regional demands were assessed. Regional demand was evaluated by considering Hillsborough, Manatee, Pasco, Pinellas, and Sarasota counties.

National demand for bachelor's degree level professionals in Computational and Applied Mathematics showed a strong increase from the first half of 2014 to the first half of 2017, rising from 257,292 jobs posted to 339,770 jobs posted, a 32% increase in demand in three years. A substantially greater rise in demand was seen regionally, rising from 1,982 jobs posted in the first half of 2014 to 3,583 jobs posted in the first half of 2017, a 79% increase in demand in three years.

Locally, the city of St. Petersburg has identified Data Analytics, specifically including key skills in mathematics and statistics, as one of the five top key areas for economic development in the Grow Smarter Initiative (2014). Data Analytics & Business Intelligence is one of the initial concentrations available in this proposed program. Additionally, from 2008-2012, this report identified 257 bachelor's degree graduates in mathematics and statistics from institutions within a 25 mile radius of St. Petersburg. Currently only USF-Tampa provides bachelor's degree programs within these fields, offering Bachelor of Arts degrees in Mathematics, (CIP 27.0101 – Mathematics, General) with concentrations in Applied/Computational Mathematics, General Mathematics and Pure Mathematics. No other institutions in this area offer Bachelor of Science degrees in mathematical fields.

References

- National Governors Association. (2011). *Building a science, technology, engineering and math agenda: An update of state actions*. Washington, DC: Author.
- President's Council of Advisors on Science and Technology. (2012). *Engage to excel: Producing one million additional college graduates with degrees in science, technology, engineering, and mathematics*. Retrieved from <https://www.whitehouse.gov/sites/default/files/microsites/ostp/pcast-engage-to-excel-v11.pdf>
- St. Petersburg, FL. (2014). Grow smarter initiative: Target business analysis/ Retrieved from http://www.stpete.com/uploads/5/4/1/7/54175729/grow_smarter_marketing_revie.pdf

B. Demand: Describe data that support the assumption that students will enroll in the proposed program. Include descriptions of surveys or other communications with prospective students.

Last year within the state of Florida, 2,788 high school seniors taking College Board exams listed mathematics as one of their top three majors of interest. Additionally, data from students taking the PSAT in Florida since 2011 show a definite upward trend in interest in pursuing mathematics degrees. This interest significantly exceeds the total number of students at all stages in their undergraduate mathematics programs in Florida, indicating likely additional demand for program seats. Data from the SUS echo this increasing demand for math programs in the state. Student enrollment in all undergraduate programs in CIP 27 is provided in Table 1.

Student interest in mathematics at USFSP is also increasing. Last spring, without any math major or minor in place, 16 USFSP students founded a Math Club. In less than one semester, the club has enjoyed an over 90% increase in membership. Students have repeatedly expressed a desire for a math major and/or minor, yet USFSP has had none to offer. Overall, about 13% of USFSP students who leave this institution without graduating do so in order to pursue degrees USFSP does not offer. In the last three academic years, 11 students who started at USFSP left for other institutions to pursue degrees in mathematics elsewhere.

When asked informally, students interested in math at USFSP were uniformly enthusiastic about the prospect of a Mathematics: Computational & Applied degree program. They expressed strong positive attitudes for this program saying that it sounded prestigious, important, and interesting. In fact, only 24 institutions in the US offer programs in this CIP. The top 10 "Best Colleges with Computational and Applied Mathematics Degrees in the US" according to Universities.com include Stanford University, Rice University, University of Southern California, Colorado School of Mines, University of Texas at Austin, Brigham Young University, Rochester Institute of Technology, and Purdue.

Hosting the regional middle school MathCOUNTS competition at USFSP provides early exposure of talented and mathematically inclined middle school students to our program, and is part of a reasonable pipeline for recruiting students. USFSP is also moving forward to sponsor one or more Girls Who Code programs for local middle and high school students, supporting student interest in our program.

Pinellas County has three high schools and one middle school program specifically focused on STEM preparation: East Lake High School Academy of Engineering in Tarpon Springs; the Center for Computer Technologies and Countryside High School Institute for Science, Technology, Engineering, and Mathematics, both in Clearwater; and the Azalea Middle School Engineering Gateway to Technology in St. Petersburg, which provides early and rich educational opportunities for students in mathematics and other areas.

USFSP hosts a science and mathematics summer camp for Pinellas county fourth grade students each year.

The prestige and value of a program in Mathematics: Computational & Applied is evidenced by the reputation of the institutions already offering such programs. The need within this state is clear from the

ever growing interest expressed by high school students and students already at USFSP. The value of this program to employers has already been discussed.

Table 1: Undergraduate enrollment in all CIP 27.xxxx in SUS by year

	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
FAMU	34	32	30	36	39	37	32	32	28	30
FAU	67	79	98	111	119	137	141	135	126	134
FGCU	34	43	58	60	65	61	78	70	67	66
FIU	111	110	121	137	118	157	180	173	173	177
FPU										
FSU	154	151	209	237	243	283	288	293	319	310
NCF										
UCF	134	131	176	220	273	251	252	328	370	383
UF	289	278	291	296	328	316	322	344	351	414
UNF	106	102	126	127	137	148	153	152	162	164
USF	156	186	186	243	225	226	269	318	283	288
UWF	82	83	94	95	101	95	97	95	89	86
Total	1,167	1,195	1,389	1,562	1,648	1,711	1,812	1,940	1,968	2,052

Undergraduate degree production within the 27.xxxx CIP, provided in Table 2, is also increasing.

Table 2: Bachelor's degrees awarded in CIP 27.xxxx in SUS by academic year

	2006/2007	2007/2008	2008/2009	2009/2010	2010/2011	2011/2012	2012/2013	2013/2014	2014/2015	2015/2016
FAMU	13	3	5	3	4	7	7	5	7	3
FAU	20	30	24	25	29	27	28	33	36	35
FGCU		6	8	9	8	13	14	12	13	21
FIU	27	18	10	11	20	16	14	14	24	31
FPU										
FSU	17	31	30	31	50	42	65	77	83	98
NCF										
UCF	15	16	21	22	21	47	42	50	52	48
UF	71	84	88	82	81	101	92	115	121	117
UNF	15	16	14	17	13	22	20	20	22	24
USF	24	46	25	40	45	57	56	63	65	60
UWF	18	17	20	19	18	20	22	23	19	19
Total	220	267	245	259	289	352	360	412	442	456

- C. If substantially similar programs (generally at the four-digit CIP Code or 60 percent similar in core courses), either private or public exist in the state, identify the institution(s) and geographic location(s). Summarize the outcome(s) of communication with such programs with regard to the potential impact on their enrollment and opportunities for possible collaboration (instruction and research). In Appendix C, provide data that support the need for an additional program.

No other institution in the SUS offers bachelor's degrees within the 27.0304 CIP. No other programs in the four-digit CIP Code exist in the SUS. Significant core course differences in this proposed program make it unique in the state, providing students with a broad base of mathematical and statistical skills, knowledge, and abilities, in the context of a recognizable and valued program of preparation for careers or graduate studies.

- D. Use Table 1 in Appendix A (1-A for undergraduate and 1-B for graduate) to categorize projected student headcount (HC) and Full Time Equivalents (FTE) according to primary sources. Generally undergraduate FTE will be calculated as 30 credit hours per year and graduate FTE

will be calculated as 24 credit hours per year. Describe the rationale underlying enrollment projections. If students within the institution are expected to change majors to enroll in the proposed program at its inception, describe the shifts from disciplines that will likely occur.

Initial student enrollment will be dominated by incoming new FTIC students. Given that this institutional already has experienced loss of admitted students due to lack of math related degree programs, it is likely that some lower level students already enrolled will be retained if this proposed program is approved. A few Biology and Health Sciences students (< 5) who are already enrolled at USFSP and members of the Math Club have indicated interest in this major.

Initially, a very modest number of upper level students transferring from within USFSP and other four year SUS institutions are anticipated. This new program offers a unique curriculum that is likely to appeal to students in related fields.

In years two through five, growth of the program will be dominated by incoming FTIC students, as high school students, counselors, teachers, and families become aware of the program. The pipeline created via direct outreach to the STEM focused area high and middle schools, USFSP sponsored Girls Who Code clubs, and MathCOUNTS participants and their families provides dominant avenues for student recruitment. Transfers from Florida community colleges will also support program enrollment growth.

- E. Indicate what steps will be taken to achieve a diverse student body in this program. If the proposed program substantially duplicates a program at FAMU or FIU, provide, (in consultation with the affected university), an analysis of how the program might have an impact upon that university's ability to attract students of races different from that which is predominant on their campus in the subject program. The university's Equal Opportunity Officer shall review this section of the proposal and then sign and date Appendix B to indicate that the analysis required by this subsection has been completed.**

USFSP actively recruits and supports prospective students in many underserved populations. In particular USFSP prioritizes outreach to underrepresented groups and engages in monthly high school counselor updates for those students who are in the admissions process to ensure timely application completion and admission decisions. USFSP places a very high commitment to these prospective students who are members of underrepresented populations. These actions and commitments are central to the draft institutional Diversity and Inclusion Plan which emphasizes recruiting, retaining, and graduating more students from underrepresented groups, especially in fields where they are particularly underrepresented.

USFSP draws the majority of its students from the surrounding region, in particular from Pinellas County. Of the approximately 3,780 undergraduate students enrolled at USFSP in the Fall 2016 semester, 15% were Hispanic, 8% were African American, and 61% were female. This program will provide access to students in these groups which are historically underrepresented in mathematics. Comparative demographic data are provided in table 3.

Table 3: Population demographics for Pinellas County and USFSP

	White	Black	Hispanic	Asian/Other	Native American
Pinellas County	75%	11%	9%	4%	0%
USFSP Students	66%	8%	16%	4%	0%
USFSP Staff/Admin	71%	16%	8%	5%	0%
USFSP Leadership	64%	14%	0%	14%	7%

Through a collaborative effort across the Colleges of Education, Arts and Sciences, and Business, USFSP plans to sponsor one or more Girls Who Code clubs for local middle and high school students in Pinellas County, supporting female and minority student interest in and exposure to our program.

Hosting the annual regional middle school MathCOUNTS competition at USFSP provides early exposure of talented and mathematically inclined middle school students to our program, and is part of a strategic pipeline for recruiting local and regional students.

Finally, USFSP hosts area fourth grade students from underserved schools, most of whom are from under-represented groups, at summer STEM Camp, incorporating active and inquiry based grade appropriate learning experiences supported the by the College of Education. The camp is organized by the Community Liaison of the College of Education and is jointly staffed by elementary school teachers and USFSP students, faculty, and staff.

III. Budget

- A. Use Table 2 in Appendix A to display projected costs and associated funding sources for Year 1 and Year 5 of program operation. Use Table 3 in Appendix A to show how existing Education & General funds will be shifted to support the new program in Year 1. In narrative form, summarize the contents of both tables, identifying the source of both current and new resources to be devoted to the proposed program. (Data for Year 1 and Year 5 reflect snapshots in time rather than cumulative costs.)**

Tables 2-A and 3-A are provided in Appendix A.

Projected costs and funding sources are provided in Table 2-A. Costs in year one are dominated by existing and anticipated new faculty salaries and benefits. Two new faculty lines have been granted: one full professor and one assistant professor in mathematics areas. In addition to salaries and benefits, both will require approximately \$45,000 in start-up costs and an additional \$3000 each for administrative costs associated with these lines. Additional costs related to enrollment growth will be incurred for personal services (adjunct faculty members) and library services.

The concentrations being proposed initially are Mathematics and Data Analytics & Business Intelligence, which consists of existing courses already being taught by faculty in the Kate Tiedemann College of Business. Because students do not take concentration courses until their third and fourth years in the program no students are expected to be enrolled in concentration courses in year 1. By year 5, students from this program may be enrolled in concentration courses, but course caps on the Data Analytics & Business Intelligence courses will accommodate this enrollment without incurring significant additional costs.

By year five, major program costs are comprised of mathematics and statistics faculty salaries and benefits, with additional costs attributed to enrollment growth and library services.

- B. Please explain whether the university intends to operate the program through continuing education, seek approval for market tuition rate, or establish a differentiated graduate-level tuition. Provide a rationale for doing so and a timeline for seeking Board of Governors' approval, if appropriate. Please include the expected rate of tuition that the university plans to charge for this program and use this amount when calculating cost entries in Table 2.**

USFSP does not intend to operate the program through continuing education, seek approval for market tuition rate, or establish a differentiated graduate-level tuition.

- C. If other programs will be impacted by a reallocation of resources for the proposed program, identify the impacted programs and provide a justification for reallocating resources. Specifically address the potential negative impacts that implementation of the proposed program will have on related undergraduate programs (i.e., shift in faculty effort, reallocation of instructional resources, reduced enrollment rates, greater use of adjunct faculty and teaching assistants). Explain what steps will be taken to mitigate any such impacts. Also, discuss the potential positive impacts that the proposed program might have on related undergraduate**

programs (i.e., increased undergraduate research opportunities, improved quality of instruction associated with cutting-edge research, improved labs and library resources).

This proposed Mathematics: Computational & Applied program is not directly competing with or replacing any current programs. No programs will be terminated as a result of approval. No negative impacts to any units in the university are anticipated.

Resources needed for this program are dominated by the need for new full time, permanent faculty lines. These faculty lines will be supported by anticipated performance based funding, current base funding, or by funds released from internal reallocation of existing resources. No additional labs or physical facilities are needed

Collaborating with the USFSP Kate Tiedemann College of Business, this program will offer a concentration in Data Analytics & Business Intelligence, one of the top five areas highlighted in the St. Petersburg economic development plan. Additional collaborative concentrations might include data sciences, math for natural sciences, math for health sciences, math for physical sciences, math for entrepreneurship, math for urban planning and construction, math for digital media, pre-actuarial studies, and others.

Discussion with the College of Education administration and faculty members has begun regarding approving students in the proposed major for entry into the current Professional Training Option (PTO) for teacher certification as a means of increasing the number of exceptionally well prepared mathematics teachers. Such teachers are deeply needed in this region and throughout the state.

D. Describe other potential impacts on related programs or departments (e.g., increased need for general education or common prerequisite courses, or increased need for required or elective courses outside of the proposed major).

USFSP is growing. However, in order to continue to attract more students, additional majors are critically needed. This program will provide additional opportunities to develop related majors that support existing and future STEM programs as USFSP expands its majors. Florida's areas of strategic emphasis highlight the need for STEM workers and workers with skills and abilities that are directly related to mathematics.

E. Describe what steps have been taken to obtain information regarding resources (financial and in-kind) available outside the institution (businesses, industrial organizations, governmental entities, etc.). Describe the external resources that appear to be available to support the proposed program.

At a minimum, two new permanent faculty members are needed before the implementation of this program in the Fall, 2018 semester. The Interim Regional Chancellor has approved both of these new faculty lines, to be filled in Fall, 2018. One new full time, tenured full professor will provide leadership of the academic unit and will develop partnerships with regional businesses, industries, and governmental organizations, as well as provide development and delivery of critical core courses in his or her area of expertise. One new assistant professor is needed for expertise in essential core course development and delivery. These new faculty leaders will also host employer forums and round table discussions to ensure the proposed program and initial and future concentrations meet employers' needs. Internship and post-graduation employment opportunities within the region are being identified by USFSP Career Services. Future permanent tenure track and instructor lines will be needed as program enrollment increases.

Currently there is no separate Department of Mathematics and Statistics at USFSP. The mathematics and statistics faculty members are housed in the Department of Biological Sciences. Because this is a new program, there are no existing program funds other than a small amount provided to the mathematics and statistics faculty members from the Department of Biological Sciences as part of the summer course revenue sharing from the College of Arts and Sciences. Resources for this program may come from

anticipated Performance Based Funding revenue or from other institutional or college sources. Resources for establishing this program will include additional permanent tenure track and non-tenure track faculty lines. The new Full Professor is needed to provide program leadership in order to best meet the goals and needs of the key stakeholders in the program including the institution, mathematics and statistics faculty members, students, those in other disciplines, and partners in the business community.

IV. Projected Benefit of the Program to the University, Local Community, and State

Use information from Tables 1 and 2 in Appendix A, and the supporting narrative for “Need and Demand” to prepare a concise statement that describes the projected benefit to the university, local community, and the state if the program is implemented. The projected benefits can be both quantitative and qualitative in nature, but there needs to be a clear distinction made between the two in the narrative.

Positive impacts of this program on the university and other institutional programs are wide ranging. Mathematics is a foundational discipline of any university. As a Carnegie Master’s Degree granting university, mathematics is central to and required for our general education core courses. USFSP currently does not have any mathematics degree programs and therefore has an institutional need for a mathematics related program for current and new departments, majors, and students. Currently the institution has approximately 4,700 enrolled students but offers only 26 majors. The approved Master Academic Plan seeks to significantly increase the number of majors offered, focusing on many STEM fields. Mathematics is essential to all of these areas. As the institution grows, a strong mathematics program and faculty will be critical to success of other new programs, recruitment of strong students, and support of cross-disciplinary undergraduate, graduate, and faculty research.

Student success in many disciplines depends on strong quantitative skills. Students in this program will be able to serve as tutors and peer coaches, fostering student learning and success in quantitative areas across all disciplines including natural and social sciences, the arts and humanities, business, and education. Success in mathematics courses supports student retention and graduation across all majors.

Locally, the city of St. Petersburg has identified Data Analytics, specifically including key skills in mathematics and statistics, as one of the top key areas for economic development in the Grow Smarter Initiative (2014). Data Analytics & Business Intelligence is one of the initial concentrations available in this proposed program. Additionally, from 2008-2012, this report identified 257 bachelor’s degree graduates in mathematics and statistics, from institutions within a 25 mile radius of St. Petersburg. Currently only USF Tampa provides bachelor’s degree programs within this area, offering Bachelor of Arts degrees in Mathematic, (CIP 27.0101 – Mathematics, General) with concentrations in Applied/Computational Mathematics, General Mathematics and Pure Mathematics. No other institutions in this area offer Bachelor of Science degrees in mathematical fields.

Regional demand for bachelor’s level professionals in mathematics revealed a 79% increase in demand in three years from 1,982 jobs posted in the first half of 2014 to 3,583 jobs posted in the first half of 2017.

Graduates from this proposed program will fulfill critical workforce needs in the identified in the State of Florida Workforce Innovation and Opportunity Act for in career fields requiring knowledge, skills, and abilities in the areas of mathematics, critical thinking, problem solving, reasoning and information ordering. Mathematics is one of the top three occupations with the highest rate of growth of job openings in the state of Florida.

V. Access and Articulation – Bachelor’s Degrees Only

- A. **If the total number of credit hours to earn a degree exceeds 120, provide a justification for an exception to the policy of a 120 maximum and submit a separate request to the Board of Governors for an exception along with notification of the program’s approval. (See criteria in Board of Governors Regulation 6C-8.014)**

The total number of credit hours required to earn a degree in this program will not exceed the 120 credit hour maximum.

- B. List program prerequisites and provide assurance that they are the same as the approved common prerequisites for other such degree programs within the SUS (see link to the Common Prerequisite Manual on [the resource page for new program proposal](#)). The courses in the Common Prerequisite Counseling Manual are intended to be those that are required of both native and transfer students prior to entrance to the major program, not simply lower-level courses that are required prior to graduation. The common prerequisites and substitute courses are mandatory for all institution programs listed, and must be approved by the Articulation Coordinating Committee (ACC). This requirement includes those programs designated as "limited access."**

If the proposed prerequisites are not listed in the Manual, provide a rationale for a request for exception to the policy of common prerequisites. NOTE: Typically, all lower-division courses required for admission into the major will be considered prerequisites. The curriculum can require lower-division courses that are not prerequisites for admission into the major, as long as those courses are built into the curriculum for the upper-level 60 credit hours. If there are already common prerequisites for other degree programs with the same proposed CIP, every effort must be made to utilize the previously approved prerequisites instead of recommending an additional "track" of prerequisites for that CIP. Additional tracks may not be approved by the ACC, thereby holding up the full approval of the degree program. Programs will not be entered into the State University System Inventory until any exceptions to the approved common prerequisites are approved by the ACC.

No other SUS institutions offer undergraduate programs in CIP 27.0304, so no common prerequisites are listed in the Common Prerequisite Manual. The proposed prerequisites for this program, which do align with the common prerequisites listed for CIP 27.0101, are:

Degree Prerequisites (Total of 21 credits, of which 10 credits are included in General Education requirements)

- COP 2030 – Programming Concepts (3 credits)
- STA 2023 – Introductory Statistics I (3 credits, also for general education)
- MAC 2311 – Cal I (4 credits, also for general education)
- MAC 2312 – Calculus II (4 credits)
- MAC 2313 – Calculus III (4 credits)
- MAP 2302 – Differential Equations (3 credits)
- One general education lab science course (4 credits total: 3 credits for general education and 1 credit for lab)

- C. If the university intends to seek formal Limited Access status for the proposed program, provide a rationale that includes an analysis of diversity issues with respect to such a designation. Explain how the university will ensure that Florida College System transfer students are not disadvantaged by the Limited Access status. NOTE: The policy and criteria for Limited Access are identified in Board of Governors Regulation 6C-8.013. Submit the Limited Access Program Request form along with this document.**

The university does not intend to seek formal Limited Access status for this proposed program.

- D. If the proposed program is an AS-to-BS capstone, ensure that it adheres to the guidelines approved by the Articulation Coordinating Committee for such programs, as set forth in Rule 6A-10.024 (see link to the Statewide Articulation Manual on [the resource page for new program proposal](#)). List the prerequisites, if any, including the specific AS degrees which may transfer into the program.**

This program is not an AS-BS Capstone.

Institutional Readiness

VI. Related Institutional Mission and Strength

- A. Describe how the goals of the proposed program relate to the institutional mission statement as contained in the SUS Strategic Plan and the University Strategic Plan (see link to the SUS Strategic Plan on [the resource page for new program proposal](#)).**

The mission statement of USFSP is to “inspire scholars to lead lives of impact.” Graduates of this proposed program will be well prepared to make positive and significant impacts in the local, national, and global economy. Nationally, about 1 million new professions in STEM fields will be needed by 2022 to support economic growth and maintain global preeminence in these fields. In math alone, nearly 43,000 new jobs are anticipated, reflecting a 28% growth rate. The top skills, abilities and knowledge identified for new and emerging occupations in the State of Florida Workforce Innovation and Opportunity Act highlight the need for mathematical and reasoning skills, problem solving ability, and critical thinking. Further, mathematics is one of the top three occupations with the highest rate of growth of job openings in the state. Math related skills and abilities including critical thinking, problem sensitivity, reasoning and information ordering are among the most needed in Florida’s most rapidly growing occupations.

This program supports the first four goals of the Vision 20/20 USFSP Strategic Plan. These goals are:

1. Distinctive Identity--This program will contribute to the USFSP Distinctive Identity. Offering new programs and degrees is essential to being able to increase unduplicated and duplicated student head count and retain students who might otherwise transfer to pursue degrees which we do not offer currently.

2. Student Success and Culture--

Key performance indicators for this goal addressed by this program are:

- 2.2 Percent of Bachelors graduates employed full time in FL or continuing their education in the US 1-year after graduation. The growth rate and job outlook for mathematics related fields is excellent, regionally, in the state, and nationally.
- 2.3 Median average full-time wages of undergraduates employed in Florida 1-year after graduation. The annual median wage is \$58,954 for US workers with between 1 and 4 years of experience in careers employing Bachelor of Science mathematics degree holders (PayScale, 2017). The median annual wage of Florida mathematicians is \$89,930 (United States Department of Labor Bureau of Labor Statistics, 2015).

Student success in many disciplines depends on strong quantitative skills. Students in this program will be able to serve as tutors and peer coaches, fostering student learning and success in quantitative areas across all disciplines including natural and social sciences, the arts and humanities, business, and education. Success in mathematics courses supports student retention and graduation across all majors.

3. Faculty Excellence in Teaching and Research – Expanding on the excellence in teaching already demonstrated in our mathematics courses, this program will serve to foster continued improvement in pedagogy within the discipline. Current and future faculty in the Mathematics: Computational & Applied program will engage in their own research and support undergraduate and graduate student research in all fields. These faculty members will also be able to collaborate with and support the research of colleagues in other disciplines.

4. Strategic Partnerships – This program will prepare graduates for careers in fields that rely on the skills, knowledge and abilities in computational and applied mathematics, such as aerospace, banking, computing, consulting, data analytics, electronics, energy, finance, government, medical device development, transportation, and many others (Society for Industrial and Applied Mathematics, 2017).

As such, faculty will work with partners in the business community to align the needs of potential employers with the courses offered as part of this program. These partners may also provide internships and opportunities for community engagement within the context of the program. Florida is among the ten states that employ the most mathematicians and the median annual wage of Florida mathematicians is \$89,930 (United States Department of Labor Bureau of Labor Statistics, 2015).

In support of the USF System goals, this program supports Goal 1, related to “well educated and highly skilled global citizens through our continuing commitment to student success” (University of South Florida System, n.d., p. 13) by preparing students with outstanding skills, knowledge, and ability in computational and applied mathematics. Included within this goal is an explicit commitment to increasing support for students in STEM fields. This program also supports Goal 2, by providing support for undergraduate, graduate, and faculty research in partnership with other disciplines that rely on quantitative reasoning and analysis. Goal 3 addresses the need for building new partnerships that support Florida’s economy. This program supports Goal 3 as indicated in the USFSP Key performance indicators 2.2 and 2.3, above.

References

- Payscale. (2017). Bachelor of Science (BS / BSc), Mathematics Degree Average Salary. Retrieved from [http://www.payscale.com/research/US/Degree=Bachelor_of_Science_\(BS_%2f_BSc\)%2c_Mathematics/Salary#by_Years_Experience](http://www.payscale.com/research/US/Degree=Bachelor_of_Science_(BS_%2f_BSc)%2c_Mathematics/Salary#by_Years_Experience)
- Society for Industrial and Applied Mathematics. (2017). Where Can I Work? Retrieved from <https://www.siam.org/careers/thinking/work.php>
- State of Florida. (2016). Workforce innovation and opportunity act: Unified plan 2017-2020. Retrieved from careersourceflorida.com/wp-content/uploads/2016/01/WIOA-Plan-2016-Web.pdf
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- University of South Florida System (n.d.). 2013-2018 Strategic Plan. Retrieved from <http://www.ods.usf.edu/Plans/Strategic/docs/USF-Strategic-Plan-2013-2018.pdf>
- United States Department of Labor Bureau of Labor Statistics. (2015). Occupational outlook handbook: Math occupations. Retrieved from <https://www.bls.gov/oes/current/oes152021.htm#ind>

B. Describe how the proposed program specifically relates to existing institutional strengths, such as programs of emphasis, other academic programs, and/or institutes and centers.

The largest undergraduate majors at USFSP, Biology and Psychology, rely heavily on outstanding mathematics and statistics skills, and therefore excellent mathematical and statistical preparation. This program will improve course delivery as new faculty members with outstanding teaching and research skills join the mathematics and statistics faculty already in place. Currently, the majority of sections of the required mathematics courses for these majors are taught by adjunct faculty, which is not optimal for ensuring excellence in student learning.

The proposed concentration in Data Analytics & Business Intelligence addresses a critical need identified in the St. Petersburg GROW SMARTER economic development plan, through collaboration with the Kate Tiedemann College of Business.

Students in the proposed program may pursue careers as middle or high school mathematics teachers through completion of the College of Education’s Professional Training Option (PTO) for teacher certification of students majoring in mathematics. Outstanding math teachers are desperately needed in area k-12 schools.

Because mathematics is an intrinsic part of many other disciplines, including life and social sciences, business, and education, this program offers abundant opportunities for collaborative and/or interdisciplinary opportunities at other USF and SUS institutions. Natural opportunities for collaboration might include data sciences, math for natural sciences, math for health sciences, math for physical

sciences, math for entrepreneurship, math for urban planning and construction, math for digital media, and pre-actuarial studies, for example.

We plan to collaborate with area employers who will be likely to provide internships for our students and/or full time jobs for our graduates in order to align the skills taught and content mastered with the real needs of our regional partners.

- C. Provide a narrative of the planning process leading up to submission of this proposal. Include a chronology in table format of the activities, listing both university personnel directly involved and external individuals who participated in planning. Provide a timetable of events necessary for the implementation of the proposed program.**

In September, 2016, the Regional Vice Chancellor of Academic Affairs (RVCAA) initiated the Master Academic Planning process at USFSP, to be completed in 5 phases. During Phase I, each academic unit was invited to use program indicators including student/faculty FTE ratio, FTIC retention in the program, transfer retention in the program, enrollment growth trend in the last 3 years, graduation rates, SCH for permanent and contingent faculty, graduation rates with excess credit hours, and enrollment growth in under-represented populations, and many others. During Phase 2, each unit prepared a list of Strengths, Weaknesses, Opportunities, Threats and a vision of their future direction. Phase 3 entailed program planning, including a determination regarding whether each program should grow, remain the same, or be revised, based on findings from the preceding phases. During this time, mathematics and statistics faculty members affirmed the critical need for a mathematics program at USFSP. This need was and is echoed by faculty members across disciplines and colleges, and all levels of administration. The mathematics and statistics faculty members put forward a simple proposal for an applied mathematics degree with concentrations in many areas related to computational and applied mathematical disciplines.

During Phase 4, the RVCAA working with the campus deans composed a draft Master Academic Plan which was thoroughly discussed and revised with significant input from faculty, across colleges and disciplines. Ultimately, in Phase 5, the final Master Academic Plan was created and was subsequently approved by the USF System leadership.

During the USF System Master Academic Planning process, the USFSP mathematics proposal rose to the highest priority. With that encouragement, the mathematics and statistics faculty members prepared a program pre-proposal for CIP 27.0304, which was added to the BOG work plan for fall 2017.

Table 4: Planning Process

Date	Participants	Planning Activity
September 2016	Mathematics and statistics faculty members, College Dean, RVCAA	Prepare program indicators analysis for math unit contribution to Master Academic Planning process
October-November 2016	Mathematics and statistics faculty members, College Dean, RVCAA	Prepare SWOT analysis for math unit for contribution to Master Academic Planning process
November, 2016-Spring, 2017	Deans, Regional Vice Chancellor for Academic Affairs, various faculty	Draft and revise Master Academic Plan
March, 2017	USF System Leadership	Mathematics program included as Year 1 action for SUS 5-year Master Plan for New Degrees across the USF System
March, 2017	Mathematics and statistics faculty members, College Council, College Dean, RVCAA	Pre-proposal drafted and vetted
March 27, 2017	APAC	Pre-proposal approved
April 14, 2017	CVAP	Pre-proposal approved
August-	Mathematics and statistics faculty	Proposal drafted

September, 2017	members	
September 29, 2017	Mathematics and statistics faculty members	Proposal final review

Table 5: Events Leading to Implementation

Date	Implementation Activity
Fall 2017- Summer 2018	Recruit Full Professor to lead program, initiate and sustain partnerships with businesses, governmental units, teach upper level courses in program.
Fall 2017- Summer 2018	Recruit Assistant Professor to teach in program, support student capstone, independent study.
Fall 2017- Summer 2018	Convert visiting faculty lines to permanent lines to provide program stability
October, 2017	Review of proposal by Registrar and Director of Undergraduate Advising
October, 2017	Deans, Chief Diversity Officer, approval and letters of support
October 13, 2017	College of Arts and Sciences Academic Planning Committee Review and Approval
November 8, 2017	Undergraduate Council Review and Approval
November 16, 2017	Academic Program Advisory Committee (APAC) Review and Approval
December 28, 2017	Academic & Campus Environment Committee (ACE) Review and Approval
March 8, 2018	Board of Trustees Review and Approval
March 28-29, 2018	Board of Governors Review and Approval
Spring 2018	If approved by BOG, submit Substantive Change Request to SACS
Fall 2018	New Computational and Applied Math major is implemented and listed in the undergraduate catalog.

VII. Program Quality Indicators - Reviews and Accreditation

Identify program reviews, accreditation visits, or internal reviews for any university degree programs related to the proposed program, especially any within the same academic unit. List all recommendations and summarize the institution's progress in implementing the recommendations.

USFSP is accredited by the Southern Association of Colleges and Schools (SACS). If this proposed program is approved by the BOG, submission of a Substantive Change Form to SACS will be required. Only after SACS grants approval, will this program be added to the USFSP inventory and catalog.

Because this is a new program, it has no history of Program Reviews. However, formal Program Reviews will be conducted every 7 years, in accordance with the College of Arts and Sciences policy. These Program Reviews provide a substantial self-study as well as evaluation and recommendation from outside reviewers. The proposed program will undergo annual Academic Learning Compact reviews by the program leaders (self-evaluation) to assess student learning. Additionally, institutional SACS accreditation reviews ensure appropriate Faculty Credentialing, ALC's, and all other aspects of higher education review are carried out for all programs at this institution.

VIII. Curriculum

- A. Describe the specific expected student learning outcomes associated with the proposed program. If a bachelor's degree program, include a web link to the Academic Learning Compact or include the document itself as an appendix.**

Graduates of the undergraduate Mathematics: Computational & Applied program will be able to:

- 1a. Demonstrate mastery of the knowledge, skills, and abilities related to their program of study in computational and applied mathematics;

- 1b. Recognize and apply connections between computational and applied mathematics and other fields and disciplines;
- 2a. Communicate their understanding of the utility of computational and applied mathematics to others, whether as part of their careers or in pursuit of advanced degrees;
- 3a. Reason effectively and rigorously in various areas of computational and applied mathematics;
- 3b. Think critically and creatively as they solve applied problems related to mathematics;
- 4a. Demonstrate engagement with community partners; and
- 5a. Demonstrate the ability to understand the relationship between mathematics and society.

The Academic Learning Compact is provided in Appendix C.

B. Describe the admission standards and graduation requirements for the program.

Admissions standards are the same as those for admission to the University of South Florida St. Petersburg.

Graduation requirements include the minimum requirements for USFSP and the College of Arts and Sciences:

- Minimum of 120 earned semester hours with overall 2.00 GPA, including all courses attempted within the USF System;
- A transfer student must have a minimum USF GPA of 2.0 or higher and an overall GPA of 2.0 or higher;
- Complete a minimum of 30 credit hours at USFSP;
- Complete a minimum of 20 credit hours in the major at USFSP;
- Satisfactorily complete writing and computation course requirements of 6A-10.030;
- Earn a minimum of 42 semester hours of upper-level work (courses numbered 3000 and above);
- Complete all Liberal Arts Requirements;
- Complete program requirements; and
- Be recommended for graduation by the Dean of the College of Arts and Sciences.

Students must complete all required courses with a grade of C or better (not C-).

Degree Prerequisites (15 credits beyond courses which are already included in General Education requirements):

- COP 2030 – Programming Concepts (3 credits)
- STA 2023 – Introductory Statistics I (3 credits, also for general education)
- MAC 2311 – Calculus I (4 credits, also for general education)
- MAC 2312 – Calculus II (4 credits)
- MAC 2313 – Calculus III (4 credits)
- MAP 2302 – Differential Equations (3 credits)
- One general education lab science course (4 credits total: 3 credits for general education and 1 credit for lab)

C. Describe the curricular framework for the proposed program, including number of credit hours and composition of required core courses, restricted electives, unrestricted electives, thesis requirements, and dissertation requirements. Identify the total numbers of semester credit hours for the degree.

Students must complete 120 course hours, including all required prerequisite and core courses, and a concentration. The curriculum includes all university and college degree requirements. The core courses are designed to provide students with a broad knowledge base in many mathematical areas and disciplines, to prepare them for a wide variety of careers or graduate work in related fields in mathematics or statistics.

Required Core Courses (36 credits):

Mathematics – Discrete Requirements

- MAD 3107 – Discrete Mathematics (3 credits)
- MAD 4401 – Numerical Analysis I (3 credits)

Mathematics – Applied Requirement

- MAP 4310 – Mathematical Modelling (3 credits)

Mathematics – Algebraic Structures Requirements

- MAS 3105 – Linear Algebra I (3 credits)
- MAS 3156 – Vector Calculus (3 credits)

Mathematics – Geometry Requirement

- MTG 3212 – Geometry (3 credits)

Mathematics – General and Finite Requirement

- MGF 3301 – Bridge to Advanced Mathematics (3 credits)

Probability and Statistics Requirements

- STA 3024 – Introductory Statistics II (3 credits)
- STA 4201 – Computational Methods for Applied Statistics (3 credits)
- STA 4442 – Introduction to Probability (3 credits)

Additional Requirements

- MAT 4930 – Senior Capstone (3 credits)
- MAT 4940 – Senior Internship (3 credits)
- Students will complete a concentration of their choice

Concentration: Mathematics

Electives (select 18 credits from the elective courses below)

- MAA 4211 – Intermediate Analysis I (3 credits)
- MAD 4203 – Combinatorial Analysis I (3 credits)
- MAD 4301 – Introduction to Graph Theory (3 credits)
- MAD 4471 – Introduction to Cryptography and Coding Theory (3 credits)
- MAS 4301 – Elementary Abstract Algebra (3 credits)
- MAS 4214 – Elementary Number Theory (3 credits)
- MTG 4214 – Modern Geometry (3 credits)
- MHF 4403 – The Early History of Mathematics (3 credits)
- MHF 4406 – The History of Modern Mathematics (3 credits)

Concentration: Data Analytics & Business Intelligence Concentration

(18 credits)

- ACG 2021 – Principles of Financial Accounting (3 credits)
- ECO 2013 – Economic Principles (Macroeconomics) (3 credits) (This course should be taken to meet the Social Science general education requirement)
- FIN 3403 – Principles of Finance (3 credits)
- MAR 3023 – Basic Marketing (3 credits)
- MAN 3025 – Principles of Management (3 credits)
- ISM 4930 – Predictive Analytics (3 credits)
- ISM 4930 – Data Visualization (3 credits)

Additional concentrations may be added in the future, as guided by market need, faculty expertise, and student interest.

There is no requirement for a thesis or dissertation.

D. Provide a sequenced course of study for all majors, concentrations, or areas of emphasis within the proposed program.

The recommended sequence of study for full time undergraduate students in this program is:

Year 1 – Fall (13 credits)

ENC 1101 – English Composition I (3 credits, general education requirement)
 MAC 2311 – Calculus I (4 credits, general education requirement)
 Social Sciences Course (3 credits, general education requirement)
 Humanities Course (3 credits, general education requirement)

Year 1 – Spring (14 credits)

ENC 1102 – English Composition I (3 credits, general education requirement)
 MAC 2312 – Calculus II (4 credits)
 STA 2023 – Introductory Statistics I (3 credits, general education requirement)
 Natural Sciences Course with Lab (4 credits, general education requirement)

Year 1 – Summer (6 credits)

General Education elective course (3 credits)
 General Education elective course (3 credits)

Year 2 – Fall (13 credits)

MAC 2313 – Calculus III (4 credits)
 COP 2030 – Programming Concepts (3 credits)
 STA 3024 – Introductory Statistics II (3 credits)
 Social Sciences Course (3 credits, general education requirement)

Year 2 – Spring (12 credits)

MAP 2302 – Differential Equations (3 credits)
 MGF 3301 – Bridge to Advanced Mathematics (3 credits)
 STA 4201 – Computational Methods for Applied Statistics (3 credits)
 State Communications Requirement Course (3 credits, general education requirement)

Year 2 – Summer (6 credits)

Natural Sciences Course (3 credits, general education requirement)
 Humanities Course (3 credits, general education requirement)

Year 3 – Fall (15 credits)

MAS 3105 – Linear Algebra I (3 credits)
 MAD 3107 – Discrete Mathematics (3 credits)
 MTG 3212 – Geometry (3 credits)
 Concentration Course 1 (3 credits)
 Exit Major Works/Major Issues Course (3 credits)

Year 3 – Spring (15 credits)

MAS 3156 – Vector Calculus (3 credits)
 MAD 4401 – Numerical Analysis I (3 credits)
 STA 4442 – Introduction to Probability (3 credits)
 Concentration Course 2 (3 credits)
 Exit Literature and Writing Course (3 credits)

Year 3 – Summer (3 credits)

Exit Major Works/Major Issues Course (3 credits)

Year 4 – Fall (12 credits)

MAP 4310 – Mathematical Modelling (3 credits)
 MAT 4930 – Senior Capstone (3 credits)
 Concentration Course 3 (3 credits)
 Concentration Course 4 (3 credits)

Year 4 – Spring (minimum of 11 credits)

MAT 4940 – Senior Internship (3 credits)
 Concentration Course 5 (3 credits)
 Concentration Course 6 (3 credits)
 Free Elective (2-3 credits)

Total=120 credits

E. Provide a one- or two-sentence description of each required or elective course.

REQUIRED CORE COURSES

MAD 3107 – Discrete Mathematics (3 credits)

(In USF inventory) PR: MAC 2311

An introduction to some of the aspects of discrete mathematics that are fundamental to digital computing. Topics include sets, numbers, algorithms, Boolean algebra, computer arithmetic, elementary combinatorics and an introduction to graph theory.

MAD 4401 – Numerical Analysis I (3 credits)

(In USF inventory) PR: MAP 2302 and MAS 3105

Numerical solution of algebraic and transcendental equations, interpolation and polynomial approximation, numerical differentiation and integration, numerical solution of differential equations.

MAP 4103 – Mathematical Modelling (3 credits)

PR: MAP2302, MAS3105, STA4442 or STA4201

Mathematics models are formulated for problems arising in various areas where mathematics is applied. Techniques are developed for analyzing the problem and testing validity of proposed model in the context of the specific field.

MAS 3105 – Linear Algebra I (3 credits)

(In USF inventory) CPR: MGF 3301 and MAC 2313

Linear systems, matrix algebra, vector spaces, linear independence, inner product spaces, Gram-Schmidt algorithm, linear transformations and matrix representations, determinants, eigenvalues, diagonalization, quadratic forms.

MAS 3156 – Vector Calculus (3 credits)

(In USF inventory) PR: MAC 2313

Implicit function and inverse function theorems, parameterized surfaces, submanifolds on Euclidean space, exterior calculus of differential forms, differentiation of vector fields, line and surface integrals, Stokes' Theorem, elementary continuous groups.

MGF 3301 – Bridge to Advanced Mathematics (3 credits)

(In USF inventory) CPR: MAC 2313

Techniques and logic of the construction of proofs. Topics will be selected from propositional logic, set theory, relations and functions, equivalence relations, Boolean algebra, cardinality, and limits.

MTG 3212 – Geometry (3 credits)

(In USF inventory) PR: MAC 2311

Emphasis on axiomatics, advanced Euclidean geometry, elements of projective geometry, non-Euclidean geometry.

STA 3024 – Introductory Statistics II (3 credits)

(In USF inventory) PR: STA 2023

Factorials, ANCOV; multiple curvilinear regression; response surfaces; Latin squares, Split Plots, incomplete designs; distribution free methods.

STA 4201 – Computational Methods for Applied Statistics (3 credits)

(In USF inventory) PR: STA 2023 and STA 3024

This course introduces fundamentals of the R and SAS statistical software packages. Topics include data manipulation, graphs, regression, ANOVA, hypothesis testing, and non-parametric tests.

STA 4442 – Introduction to Probability (3 credits)

(In USF inventory) PR: MAC 2312

Introduction to probability theory using calculus. Basic ideas of probability and random variables, discrete probability functions, continuous probability densities, joint distributions, transformations of random variables, moments and generating functions of random variables, limit theorems.

MAT 4930 – Senior Capstone (3 credits)

PR: Senior Standing

Topics will vary at instructor's discretion, but will provide opportunities for students to demonstrate competence in recognizing and applying connections between computational and applied mathematics and other fields and disciplines; communicating their understanding of the utility of computational and applied mathematics to others; and demonstrating the ability to understand the relationship between mathematics and society.

MAT 4940 – Senior Internship (3 credits)

PR: Senior Standing

Supervised work and learning experience under the supervision of a USFSP faculty member or administrator and an employee of the sponsoring organization. Final internship report should reflect student readiness for successful employment.

MATHEMATICS CONCENTRATION ELECTIVES**MAA 4211 – Intermediate Analysis I (3 credits)**

(In USF inventory) PR: MAC 2312

Riemann-Stieltjes integration, uniform convergence, and related topics.

MAD 4203 – Combinatorial Analysis I (3 credits)

(In USF inventory) PR: MGF 3301

Fundamental principles of counting. Topics include bijective proofs, arrangements and permutations, sets and multi sets, the Principle of Inclusion-Exclusion, partitions, generating functions, recurrence relations, and the Polya theory of counting.

MAD 4301 – Introduction to Graph Theory (3 credits)

(In USF inventory) PR: MGF 3301

Fundamental principles of Graph Theory, including isomorphism, trees and connectivity, Eulerian circuitry, Hamiltonicity, matching theory, planarity, graph colorings, Ramsey theory, and graph algorithms.

MAD 4471 – Introduction to Cryptography and Coding Theory (3 credits)

(In USF inventory) PR: MAS 3105 and MGF 3301

Cryptography combines the studies of cryptography, the creating of masked messages, and cryptanalysis, the unraveling of masked messages. Coding theory is the study of coding schemes used to detect and correct errors that occur during the data transmission.

MAS 4301 – Elementary Abstract Algebra (3 credits)

(In USF inventory) PR: MAS 3105

An introduction to the basic algebraic structures; groups, rings, integral domains, and fields; homeomorphisms and isomorphisms.

MAS 4214 – Elementary Number Theory (3 credits)

(In USF inventory) PR: MAS 3105

Divisibility, prime numbers, Fundamental Theorem of Arithmetic, Diophantine equations, the algebra of congruencies, number functions and other selected topics.

MTG 4214 – Modern Geometry (3 credits)

CPR: MAS 4301

Topics will be selected from modern plan geometry and may include Mobius geometry, elliptical and hyperbolic geometry.

MHF 4403 – The Early History of Mathematics (3 credits)

(In USF inventory) PR: MAC 2312

A study of the history and development of mathematics and its cultural impact from the formation of number systems to the Renaissance.

MHF 4406 – The History of Modern Mathematics (3 credits)

(In USF inventory) PR: MAC 2312

Traces the development of mathematical ideas in Western Culture.

DATA ANALYTICS & BUSINESS INTELLIGENCE CONCENTRATION**ACG 2021 – Principles of Financial Accounting (3 credits)**

Study of basic accounting principles including the recording and reporting of financial activity, the preparation and interpretation of financial statements.

ECO 2013 – Economic Principles (Macroeconomics) (3 credits)

Introduction to the theory of income determination with emphasis on monetary and fiscal policies. Objectives of full employment, price stability, economic growth and balance of payments stability.

FIN 3403 – Principles of Finance (3 credits)

PR: ACG 2701, ECO 2013, and ECO 2023 (prerequisite waived, pending KTCOB approval)

Study of the processes, decision structures, and institutional arrangements concerned with the use and acquisition of funds by a firm. Includes the management of the asset and liability structure of the firm under certain and risky situations. The financial decision process will include and recognize the international as well as domestic aspects of financial management.

MAR 3023 – Basic Marketing (3 credits)

PR: Junior standing

Survey of the marketing of goods and services within the economy. Attention is paid to the impact of marketing on other functional areas of business as well as society.

MAN 3025 – Principles of Management (3 credits)

PR: Junior standing

Examines intrapersonal, interpersonal, group/team, organizational, and environmental (both stakeholder and societal) factors influencing the management task.

ISM 4930 – Predictive Analytics (3 credits)

This course is an introduction to the concepts and principles of data mining. The course enables prospective marketers, data analysts, and entrepreneurs to extract useful information from large data sets and discover trends and patterns using a state-of-the-art data mining software program

ISM 4930 – Data Visualization (3 credits)

Through in-depth coverage of a data visualization tool, and a number of articles, discussions, and, most importantly projects, this course examines how to present insights gained through the application of business intelligence techniques in the most effective way in order to improve the quality of leadership decisions.

- F. For degree programs in the science and technology disciplines, discuss how industry-driven competencies were identified and incorporated into the curriculum and indicate whether any industry advisory council exists to provide input for curriculum development and student assessment.**

Not applicable.

- G. For all programs, list the specialized accreditation agencies and learned societies that would be concerned with the proposed program. Will the university seek accreditation for the program if it is available? If not, why? Provide a brief timeline for seeking accreditation, if appropriate.**

Substantive change approval will be requested from the Southern Association of Colleges and Schools immediately after program approval is obtained from the Board of Governors. Learned societies that would be interested in this program include the American Mathematical Society and the Society for Industrial and Applied Mathematics.

- H. For doctoral programs, list the accreditation agencies and learned societies that would be concerned with corresponding bachelor's or master's programs associated with the proposed program. Are the programs accredited? If not, why?**

This proposal is not for a doctoral program.

- I. Briefly describe the anticipated delivery system for the proposed program (e.g., traditional delivery on main campus; traditional delivery at branch campuses or centers; or nontraditional delivery such as distance or distributed learning, self-paced instruction, or external degree programs). If the proposed delivery system will require specialized services or greater than normal financial support, include projected costs in Table 2 in Appendix A. Provide a narrative describing the feasibility of delivering the proposed program through collaboration with other universities, both public and private. Cite specific queries made of other institutions with respect to shared courses; distance/distributed learning technologies, and joint-use facilities for research or internships.**

This program will be offered on the University of South Florida St. Petersburg campus in face to face format, with the possible exception of four of the courses in the Data Analytics & Business Intelligence concentration, which are offered as hybrid or online only courses through the USFSP Kate Tiedemann College of Business. Internships will be conducted off campus.

IX. Faculty Participation

- A. Use Table 4 in Appendix A to identify existing and anticipated full-time (not visiting or adjunct) faculty who will participate in the proposed program through Year 5. Include (a) faculty code associated with the source of funding for the position; (b) name; (c) highest degree held; (d) academic discipline or specialization; (e) contract status (tenure, tenure-earning, or multi-year annual [MYA]); (f) contract length in months; and (g) percent of annual effort that will be directed toward the proposed program (instruction, advising, supervising internships and practica, and supervising thesis or dissertation hours).**

Please see Table 4 in Appendix A.

- B. Use Table 2 in Appendix A to display the costs and associated funding resources for existing and anticipated full-time faculty (as identified in Table 4 in Appendix A). Costs for visiting and adjunct faculty should be included in the category of Other Personnel Services (OPS). Provide a narrative summarizing projected costs and funding sources.**

Projected costs and funding sources are provided in Table 2-A, in Appendix A. Costs in year one are dominated by existing and anticipated new faculty salaries and benefits. Two new faculty lines have been granted, to be filled before the Fall, 2018 semester: one full professor and one assistant professor in disciplines related to computational and applied mathematics. In addition to salaries and benefits, approximately \$45,000 in anticipated in start-up costs (for both new faculty members combined) and an additional \$3000 each for administrative costs associated with these lines. Costs for adjunct and visiting faculty members are estimated to be \$6000 per year. Instruction of courses for majors in this proposed program requires the expertise of permanent faculty members. By year five, major program costs are comprised of mathematics and statistics faculty salaries and benefits.

Because this is a new program, there are no existing program funds other than a small amount provided to the mathematics and statistics faculty members from the Department of Biological Sciences as part of the summer course revenue sharing from the College of Arts and Sciences. Resources for this program may come from anticipated Performance Based Funding revenue or from other institutional or college sources.

- C. Provide in the appendices the abbreviated curriculum vitae (CV) for each existing faculty member (do not include information for visiting or adjunct faculty).**

Curriculum vitae for Mr. Edwin Abaquita, Dr. Armando Hoare, and Dr. Maria Leite, all permanent mathematics and statistics faculty members, are provided in Appendix F. Curriculum vitae are also provided for members of the Kate Tiedemann College of Business who are associated with the Data Analytics & Business Intelligence concentration: Dr. Stephen Diasio, Dr. Varol Kayhan, Dr. Michael Luckett, Dr. Han Reichgelt, Dr. Martina Schmidt, Dr. William Sinclair, and Dr. Richard Smith.

- D. Provide evidence that the academic unit(s) associated with this new degree have been productive in teaching, research, and service. Such evidence may include trends over time for average course load, FTE productivity, student HC in major or service courses, degrees granted, external funding attracted, as well as qualitative indicators of excellence.**

Among current mathematics and statistics faculty members who will teach in this program, excellent productivity is evidenced in teaching, service, and research. Full documentation of their work is provided in each of their curriculum vitae, in Appendix F. Brief synopses of their productivity in the 2016 calendar year are provided here.

Mr. Abaquita, Instructor I, excels in classroom instruction. During the 2016 calendar year, Mr. Abaquita taught a total of 175 students distributed among 6 math sections of MAC 1105 (mean = 29/class). His student evaluations ranged from 3.86 to 4.34, with un-weighted mean of 4.1. The vast majority of student comments were positive.

- "Does a very good job, and makes math easy to learn"
- "Great professor, genuinely cares for his students"
- "Very committed to the students"
- "On top of being very organized, hardworking, and easy to get contact with, he highlighted the importance of math everyday"
- "He can be funny, makes a math class less stressful"

In his statement of teaching philosophy, Mr. Abaquita states "teaching is a passion. As a teacher, I exercise all possible ways to attain the maximum and meaningful learning experience of my students based on the proven effective assessments while setting attainable goals. Engaging students to see

positive results is always a challenge but it can be possibly done through perseverance, patience and determination.”

Mr. Abaquita participated in 3 search committees for visiting mathematics and statistics faculty members in 2016. He also served as Interim Assistant Mathematics and Statistics Program Coordinator for the academic year 2016 to 2017.

Dr. Armando Hoare, Instructor I, balances excellence in teaching with outstanding service to his unit. During the 2016 calendar year, Dr. Hoare taught a total of 151 students, including 12 graduate students, distributed among 6 mathematics and statistics classes. His student evaluations ranged from 2.59 to 4.55 with an un-weighted average of 3.75. The majority of his student comments were positive:

- “Great teacher, always there for student’s questions inside and outside of class. Goes out of his way to make sure the teacher understands the material and gives plenty of opportunities for students to succeed in his class.”
- “Dr. Hoare is a very knowledgeable professor who cares a lot about his students. He is always available to help students during office hours and via email.”
- “I love that you offer many help opportunities out of class and online because you care about students understanding and learning the material.”
- “Dr. Hoare’s Friday and weekend help sessions were very helpful and greatly appreciated. His lectures were logical and informative.”
- “All I have to say about this professor is honestly that he is truly great... I can honestly say I’ve only had a couple of good math teachers, and he makes it on that list. I probably won’t pass the course, but I know if he teaches it again next semester and I decide to give it an extra shot, I will definitely take it with him regardless of the previous grade I received.”

Dr. Hoare has provided exceptional service in his unit, as Acting Mathematics and Statistics Program Coordinator and Upper Level Mathematics Unit Director. He is currently enhancing upper level math course pedagogical strategies across the curriculum. In 2016, Dr. Hoare co-authored 1 peer-reviewed article, although no research is expected.

Dr. Maria Leite, Assistant Professor, balances the demands of her tenure-seeking position with dedication to excellence in teaching and service. During the 2016 spring semester, Dr. Leite taught a total of 37 students distributed among two courses. She took an unpaid leave of absence to focus on her research in the Fall 2016 semester.

As part of her commitment to excellence in teaching, Dr. Leite participated in multiple workshops on innovative pedagogical strategies, worked collaboratively with colleagues to enhance teaching, and participated in ongoing faculty teaching and learning professional development. In her statement of teaching philosophy, Dr. Leite affirms this commitment with four priorities:

1. Constantly overcoming challenges and working collaboratively with colleagues, using students’ feedback and scholarly literature to improve the content, quality, and effectiveness of existing courses, aligning and developing curriculum to prepare students for success in a rapidly changing world;
2. Staying updated in teaching approaches;
3. Employing innovative strategies to promote integration of information and skills that allow students to develop critical thinking and to become independent lifelong learners; and
4. Assisting students in all aspects of their academic life.

During 2016, Dr. Leite was very productive in research and grant application:

In preparation. M. Leite, B. Chen-Charpentier, F. Augusto, and O. Gaoue, Mathematical modeling of the sustainability of harvesting non-timber forest products in fragmented landscape.

In preparation. A. BenTal, M. Leite, Y. Wang, A Boolean model for neuronal-respiratory system.

In preparation. A. Arsie, M. Leite, and M. Golubitsky, Strongly Feedforward Networks: Linear Structure and Bifurcations.

Submitted. B. Chen-Charpentier, M. Leite, O. Gaoue, and F. Augusto, Mathematical Modeling of Plants under Multiple Stressors.

Submitted. Y. Wang, K. Chilakamarri, D. Kazakos, and M. Leite, Relations Between Dynamics of Network Systems and Those of Subnetwork Systems.

Submitted. M. Leite, B. Chen-Charpentier, and F. Augusto, Optimal control for forest management subject to insect infestation.

Submitted. F. Augusto, M. Leite, and M.E. Orive, The transmission dynamics of a within- and between-host malaria model.

Submitted. M. Leite, B. Chen-Charpentier, and F. Augusto, A mathematical model of tree harvesting in age-structured forests subject to beetle infestations.

Dr. Leite was awarded with 2 grants (“1” as a PI competitively selected and “1” by invitation). In addition, “2” written grants are under evaluation (Total: \$642,198; ML: \$132,072)

Granted (Total: \$57,992, ML: \$57,992)

June 2016 PI (Invited). University of Bonn, Germany. Project: “Prediction and Modeling of Hybrid Performance and Yield Gain in Oilseed Rape by Systems Biology. (Total: \$ 25,483).

Dec 2016 Co-PI (Refereed, Competitively Selected). Centre International de Mathématiques Pures et Appliquées (CIMPA): 2017 African Mathematical Schools. School on “Mathematical Modeling for Epidemiology, Ecology and Conservation”, at Abomey-Calavi University, Bénin, Africa, August 7-19, 2017. F. Augusto (Co-PI, Dept. of Ecology and Evolutionary Biology, Univ. of Kansas.), B. Chen-Charpentier (Co-PI, Dept. of Mathematics, Univ. of Texas), O. Gaoue (Co-PI, Dept. of Botany, Univ. of Hawaii at Manoa) (Total: \$32,509).

Under evaluation (Total: \$583,306; ML: \$73,180)

(Refereed) Co-PI, NSF-DMS PD 16-7334: Mathematical Biology. “Collaborative Research: Multi-Host Single- Pathogen Coevolutionary System,” F. Augusto (PI, Dept. of Ecology and Evolutionary Biology, Univ. of Kansas), L. Childs (Co-PI, Dept. Center for Communicable Diseases Dynamics, Harvard T.H. Chan School of Public Health), A. Gumel (Co-PI, School of Mathematical and Statistical Sciences, Arizona State Univ.), M. Orive (Co-PI, Dept. Ecology and Evolutionary Biol., Univ. of Kansas) (Total: \$583,306; ML \$73,180).

(Refereed) Co-PI, NSF 17-512: DEB – Biodiversity: Disc. & Analysis. Preliminary Proposal: “Collaborative Research: Multi-Host Single-Pathogen Coevolutionary System,” F. Augusto (PI, Dept. of Ecology and Evolutionary Biology, Univ. of Kansas), L. Childs (Co-PI, Dept. Center for Communicable Diseases Dynamics, Harvard T.H. Chan School of Public Health), A. Gumel (Co-PI, School of Mathematical and Statistical Sciences, Arizona State Univ.), M. Orive (Co-PI, Dept. Ecology and Evolutionary Biol., Univ. of Kansas).

Dr. Leite serves on 2 international committees, multiple mathematics unit committees, reviewed manuscripts and proceedings for an international conference. She also belongs to five professional associations relevant to her scholarship activity.

At USFSP, Dr. Leite served as Interim Mathematics & Statistics Program Coordinator in 2015.

X. Non-Faculty Resources

- A. Describe library resources currently available to implement and/or sustain the proposed program through Year 5. Provide the total number of volumes and serials available in this discipline and related fields. List major journals that are available to the university's students. Include a signed statement from the Library Director that this subsection and subsection B have been reviewed and approved.

Overview of Library

The Nelson Poynter Memorial Library, University of South Florida St. Petersburg (USFSP), houses an extensive collection of materials that supports the educational, research, and service missions of USF St. Petersburg. USF St. Petersburg faculty, staff, and student have on-site access to the Poynter Library's collection of over 221,620 items, including monographs, current periodical and serial subscriptions, newspaper subscriptions, and audiovisual titles, as well as to the shared electronic resources of the USF System, providing USFSP students unlimited access to the vast holdings of a Carnegie Research 1 doctoral institution, including 1,934 journals in mathematics, over 1,800 journals in information technology, and core mathematics and computational sciences databases, e-book collections and reference resources. Currently, the USF Libraries subscribe to over 800 proprietary databases, and more than 26,000 electronic journals. Additionally, USFSP faculty and students can access documentaries and instruction videos available online through streaming media. All resources are available remotely to currently affiliated USF students, faculty, and staff. Efficient interlibrary loan and in-person borrowing privileges give access to the resources of State University system libraries. Through a series of formal agreements, USF St. Petersburg students and faculty freely borrow materials throughout the United States, and internationally.

The library is a three-story, 81,000 square feet building, offering 21 rooms for group study, seamless wireless access, an information commons with networked computers for student research and study, laptops for student check-out, and a dedicated instruction room. A wide variety of computer hardware and software is available to students, including networked collaboration areas with large monitors and shared access points, and a video production area freely available for student use.

Relevant Databases

- *AMS Journals (American Mathematical Society)*: Fulltext articles published in journals of the American Mathematical Society.
- *Applied Science & Technology Source*, includes *Applied Science & Technology Index Retrospective*, *Applied Science & Technology Index*, *Applied Science & Technology Abstracts*, *Applied Science & Technology Full Text*, *Computer & Information Systems Abstracts*, and *Computers & Applied Sciences Complete*. Full text for 1,400 journals; high-quality indexing and abstracts for thousands of academic journals, professional publications and other reference sources.
- *Lecture Notes in Mathematics*: A series from Springer that includes research monographs; lectures; and summer schools and intensive courses on topics of current research. Includes focus on mathematical texts analyzing new developments in modelling and numerical simulation.
- *MathSciNet*: database providing access to over 55 years of mathematical reviews and current mathematical publications from the AMS from 1940 to the present.
- *ArXiv.org e-Print Archive*: Archive and distribution server for research papers in physics and related disciplines, math, nonlinear sciences, and computer science.
- *AIP conference proceedings*: AIP Conference Proceedings report findings presented at many of the most important scientific meetings around the world. Published proceedings are valuable as

topical status reports providing quick access to information before it appears in the traditional journal literature.

- *ACM Digital Library*: The Association for Computing Machinery digital library collection includes ACM journal and newsletter articles, conference proceedings and electronic books; it is the most comprehensive database of full-text articles and bibliographic literature covering computing and information technology.
- *AIAA Electronic Library - Meeting Papers*: The AIAA (American Institute of Aeronautics and Astronautics) electronic library contains more than four decades of technical information and documents online. AIAA Meeting Papers is a searchable full text database of all nonclassified papers presented at the American Institute of Aeronautics & Astronautics meetings, from 1963 to the present, available through the Institute's Electronic Library home page. AIAA publishes about 6,000 papers annually, from 20 to 30 technical conferences. The scope of the collection is diverse, covering areas associated with aerospace science. USF also subscribes to several of the journals included in the AIAA Electronic Library, including AIAA Journal, Journal of Aircraft, Journal of Guidance, Control and Dynamics, Journal of Spacecraft & Rockets, and Journal of Thermophysics and Heat Transfer.
- *Cambridge University Press Journals*: includes Acta Numerica, Advances in Applied Mathematics and Mechanics, Advances in Applied Probability, Annals of Actuarial Science, The ANZIAM Journal (Previous title: Journal of the Australian Mathematical Society. Series B. Applied Mathematics (1975 - 2000)), ASTIN Bulletin: The Journal of the IAA, British Actuarial Journal, Bulletin of Symbolic Logic, Bulletin of the Australian Mathematical Society, Combinatorics, Probability and Computing, Communications in Computational Physics, Compositio Mathematica, East Asian Journal on Applied Mathematics, Ergodic Theory and Dynamical Systems, European Journal of Applied Mathematics, Forum of Mathematics, Pi, Forum of Mathematics, Sigma, Glasgow Mathematical Journal, Journal of Applied Probability, Journal of Fluid Mechanics, The Journal of Symbolic Logic, Journal of the Australian Mathematical Society (Previous title: Journal of the Australian Mathematical Society. Series A. Pure Mathematics and Statistics (1980 - 2000) (Previous title: Journal of the Australian Mathematical Society. Series A. Pure Mathematics (1975 - 1979)), Journal of the Institute of Mathematics of Jussieu, LMS Journal of Computation and Mathematics, The Mathematical Gazette, Mathematical Proceedings of the Cambridge Philosophical Society, Mathematical Structures in Computer Science, Mathematika, Nagoya Mathematical Journal, Network Science, Numerical Mathematics: Theory, Methods and Applications, Probability in the Engineering and Informational Sciences, Proceedings of the Edinburgh Mathematical Society, Proceedings of the Royal Society of Edinburgh Section A: Mathematics, The Review of Symbolic Logic.
- *Current Contents Connect* is a weekly table-of-contents database which presents the contents pages of current issues of the world's scholarly and technical journals, books, and proceedings literature.
- *Conference Proceedings Citation Index (1990 - Present)*: Web of Science Core Collection covers the published literature from the most significant conferences, symposia, seminars, colloquia, workshops, and conventions worldwide.
- *Engineering Village*: Global coverage of scientific and technical literature in the fields of physics, electrical engineering, electronics and computer science. Coverage from 1969 to the present.
- *IEEE/IET Electronic Library (IEL) / Institute of Electrical and Electronics Engineers Xplore*: Provides full-text access to IEEE transactions, IEEE and IEE journals, magazines, and conference proceedings published since 1988, and all current IEEE standards
- *InCites Essential Science Indicators*: Thomson Reuters *Essential Science Indicators* identifies influential individuals, institutions, papers, publications, and countries in hundreds of science disciplines.
- *Institute of Physics Electronic Journals*

- *ProQuest Computer Science Journals*: Discipline-specific coverage spanning thousands of publications, many in full text, including Computer Science; Information Systems; Computer Security; Database Design; Software Development; Web Commerce; LANs; WANs; Intranets; Internet.
- *SciELO Citation Index (1997 - Present)*: Thomson Reuters Scientific Electronic Library Online Citation Index provides access to open access science journals from Africa, Latin American, Portugal, and Spain.
- *Scopus*: *Scopus* is a large multi-disciplinary abstract and citation database of peer-reviewed literature, including science journals, books and conference proceedings.
- *Springer Lecture Notes in Computer Science*: Focuses on new developments in computer science and information technology and original research results reported in proceedings and post proceedings. There are over 1000 volumes in this online collection.
- *Taylor & Francis Online Journals*: About 100 journals, with over 190,000 full text articles, within the category Mathematics and Statistics.
- *Turpion Publications*: Database of Russian Science journals, many in math and physics, in English translation.

Selected E-Book Collections

- *Cambridge Books Online*: Includes over 400 monographs from the *London Mathematical Society Lecture Note Series*, *Cambridge Studies in Advanced Mathematics*, *Cambridge Tracts in Mathematics*, *Lecture Notes in Logic*, *Perspectives in Logic*, *New Mathematical Monographs*, *AIMS Library of Mathematical Sciences*, *Australian Mathematical Society Lecture Series*, *Cambridge Monographs on Applied and Computational Mathematics*, *Cambridge Texts in Applied Mathematics*, *Learning in Doing: Social, Cognitive and Computational Perspectives*, *London Mathematical Society Student Texts*, *Cambridge Monographs on Mathematical Physics*, *Cambridge Monographs on Mechanics*, *Cambridge Series in Statistical and Probabilistic Mathematics*, *Cambridge Tracts in Theoretical Computer Science*, *Canto Classics*, and *Institute of Mathematical Statistics Textbooks*.
- *CRCnetBASE*: The Science, Technology, Engineering and Medicine eBook platform from CRC Press, offers more than 15,000 references in over 400 subject areas and more than 40 collections.
- *The IEEE-Wiley Ebooks Library*: This collection of over 400 ebooks includes handbooks, introductory and advanced texts, reference works and professional books that cover a variety of disciplines in technology and computer science.
- *Oxford Scholarship Online: Mathematics*: The Oxford Scholarship Online Mathematics Collection covers the wide field of mathematics, from pure mathematics to the many applications of mathematics and statistics. Some key series within this collection are: Oxford Logic Guides, Oxford Statistical Science Series, and Oxford Studies in Probability, Numerical Mathematics and Scientific Computation. About 115 e-books.
- *ProQuest Computer Science Collection*: Global, comprehensive coverage of computer science topics, ranging from computer security to web commerce. This database also includes deep indexed tables & figures.
- *Springer eBook Collection in Mathematics & Statistics*: Part of an integrated full-text database for journals, books, protocols, eReferences, and book series published by Springer, with 4,821 Mathematics and Statistics eBooks.
- *Springer eBook Collection in Computer Science*: This collection covers the applications, concepts, theory and technology of computer science, mostly conference proceedings and reference resources.
- *Synthesis Digital Library of Engineering and Computer Science*: Organized into series, each pertaining to a different topic in the field of engineering and computer science. Series include: Artificial Intelligence and Machine Learning, Data Management, Digital Circuits & Systems, Power Electronics, and Tissue Engineering. Lectures can be found within each series consisting of 50- to 100-page e-books written by prominent contributors to the field. Some Lectures also include enhancements such as animations, code, and audio.

Selected Digital Reference Resources

- *The Concise Oxford Dictionary of Mathematics* (5 ed.), James Nicholson, ed. Oxford University Press, 2014: Over 3,000 entries covering pure and applied mathematics and statistics, with web links, and detailed appendices.
- *A Dictionary of Computer Science* (7 ed.), edited by Andrew Butterfield and Gerard Ekembe Ngondi, Oxford University Press, 2016: Over 6,500 entries
- *Dictionary of Algorithms, Data Structures, and Problems*: Online dictionary of algorithms, algorithmic techniques, data structures, problems, and related definitions. Some entries have links to further information and links to implementations with source code.
- *Encyclopedia of Mathematics and its Applications* (Cambridge)
- *Handbook of Mathematical Functions with Formulas, Graphs, and Math Tables*, by Milton Abramowitz; Irene Stegun, an online compendium of mathematical formulas, tables, and graphs.
- *Van Nostrand's Scientific Encyclopedia (VNSE)*: A comprehensive and authoritative resource broadly covering science and mathematics.

Selected General and Multidisciplinary Databases

- *Academic Search Premier*
- *Expanded Academic ASAP*
- *General OneFile*
- *ISI Web of Science (WOS)*: Science Citation Index Expanded
- *JStor*: JStor Mathematics includes 58 journal titles.
- *OCLC PapersFirst*: Indexes over two million papers presented at conferences worldwide. Also covers congresses, expositions, workshops, symposiums, and other meetings.
- *OmniFile Full Text Mega Expanded* (EBSCO)
- *Project Muse*: Includes 3,110 e-Books and 13 Journals in the category of Science, Technology, and Mathematics.

Library Holdings by Library of Congress Classification:

LC Classification QA (Mathematics):	4,464 PRINT ITEMS USFSP LIBRARY
LC Classification QA (Mathematics):	13,735 ITEMS USF E-RESOURCES
LC Classification QA (Mathematics):	44,122 ITEMS USF TAMPA LIBRARY
LC Classification QA (Mathematics):	64,241 ALL ITEMS USF SYSTEM

LIBRARY SERVICES

A reference and instruction librarian, currently Patricia Pettijohn, is assigned to support specialized collection development and library instruction for the Mathematics and Computational sciences program as library liaison. Faculty members are encouraged to contact their liaison to request purchases of monographs, media, instructional materials, or new electronic resources. Liaisons also are available to develop and present specialized bibliographic instruction sessions for physics classes and programs. Liaisons also offer one-on-one reference sessions through the reference assistance program, RAP. Distance education courses and programs may receive reference and instruction support by both the librarian liaison and the Distance Education Instructional Designers. Distance Education support for students consists of phone and email reference assistance as well as bibliographic instruction support provided through online bibliographies and subject guides, and by librarians embedded within the online component of courses through Canvas. A broad array of library services are available online, including online renewal, and online forms may be submitted to request personalized instruction or suggesting materials for purchase. Reference and research assistance is also available by chat and email through the statewide Ask-A-Librarian service.

The Library hosts a variety of computing resources, services, and access points to support staff, student and public users. Students use computing environments including the Information Commons, Library Instructional Classroom, and public spaces such as Poynter's Corner, powered by USFSP's most dense and robust wireless network. The first floor open use computing area, the Information Commons, hosts

all of the hardware and software applications that students need. Students may also check out laptops from the circulation desk, which can be used throughout the building or in the 14 study rooms of the library.

- B. Describe additional library resources that are needed to implement and/or sustain the program through Year 5. Include projected costs of additional library resources in Table 2 in Appendix A. Please include the signature of the Library Director in Appendix B.**

The USFSP library acquires full access to the shared electronic resources of the USF Library system through a cost sharing agreement paid by the University of South Florida Saint Petersburg, based on student FTE. Both the total cost and the USFSP share of these costs increase annually, due to increases in the cost of resources, the numbers of resources, and the number of USFSP students. USFSP pays the USF system library for electronic resources based on the USFSP FTE student headcount. The USF System spent \$2,570,094 on shared electronic resources in natural sciences and mathematics, by far the most expensive disciplinary cluster, totaling almost half of the USF System shared e-resources (\$5,445,114 total). In 2016-17 USFSP paid \$257,009 for natural sciences and mathematics, which represents more than half of the USFSP total of \$464,196. As USFSP student FTE increases, the cost share will increase.

- C. Describe classroom, teaching laboratory, research laboratory, office, and other types of space that are necessary and currently available to implement the proposed program through Year 5.**

Existing classroom space in Davis Hall and the Science and Technology Building at USFSP, as well as campus computer classrooms are sufficient for the needs of this proposed program. New faculty members will need furnished offices.

- D. Describe additional classroom, teaching laboratory, research laboratory, office, and other space needed to implement and/or maintain the proposed program through Year 5. Include any projected Instruction and Research (I&R) costs of additional space in Table 2 in Appendix A. Do not include costs for new construction because that information should be provided in response to X (E) below.**

New faculty members will require furnished offices and computers. Initially, two new faculty members are anticipated in the Fall 2018 semester for this program. As the program grows during the first 5 years, several additional faculty lines will be needed, whether through conversion of existing visiting faculty lines or by creation of new lines. Formal requests for these positions have been submitted to the college as part of the Biological Sciences Department's budget requests. The mathematics faculty members are currently housed in the Department of Biological Sciences. It is hoped that the college administration will support the formation of a Department of Mathematics and Statistics as part of the natural growth of this program.

- E. If a new capital expenditure for instructional or research space is required, indicate where this item appears on the university's fixed capital outlay priority list. Table 2 in Appendix A includes only Instruction and Research (I&R) costs. If non-I&R costs, such as indirect costs affecting libraries and student services, are expected to increase as a result of the program, describe and estimate those expenses in narrative form below. It is expected that high enrollment programs in particular would necessitate increased costs in non-I&R activities.**

We do not anticipate a need for new capital expenditures for this program.

- F. Describe specialized equipment that is currently available to implement the proposed program through Year 5. Focus primarily on instructional and research requirements.**

The university currently has five computer classrooms with a total of 188 student computers available. Campus Computing also has a virtual computer lab/classroom that can support hundreds of concurrent users <https://www.usfsp.edu/computing/computer-labs/#virtual-lab> All campus classrooms are

equipped with podium computers, projectors, and internet for instructional purposes. The library and tutoring center have additional computers and collaboration systems for multiple computers. SAS, SPSS, and other mathematical software programs are already in place in the USF system Application portal.

- G. Describe additional specialized equipment that will be needed to implement and/or sustain the proposed program through Year 5. Include projected costs of additional equipment in Table 2 in Appendix A.**

No additional specialized equipment is needed.

- H. Describe any additional special categories of resources needed to implement the program through Year 5 (access to proprietary research facilities, specialized services, extended travel, etc.). Include projected costs of special resources in Table 2 in Appendix A.**

No additional special categories of resources are anticipated at this time.

- I. Describe fellowships, scholarships, and graduate assistantships to be allocated to the proposed program through Year 5. Include the projected costs in Table 2 in Appendix A.**

There are no requests for fellowships, scholarships, and graduate assistantships to be allocated to the proposed program through Year 5. Students will be encouraged to apply for existing institutional and private scholarships to support their studies.

- J. Describe currently available sites for internship and practicum experiences, if appropriate to the program. Describe plans to seek additional sites in Years 1 through 5.**

USFSP incorporated the Handshake system for integrating Career Services connections between employers and students in May, 2017. Since the implementation, 87 internship postings on Handshake have noted they are interested in hiring Mathematics majors. Some examples of companies are: Defense Intelligence Agency, Raymond James, Sprint, Transamerica, and US Geological Survey. Employers are now able to post job openings to major groups including mathematics, because the new system provides a network connecting employers and educational institutions. Prior to implementing this system, USFSP only was able to provide resources for students in majors that are currently in the USFSP catalog.

With the addition of the Mathematics: Computational & Applied program, USFSP can immediately start recruiting employers that are seeking students in this program for internships and employment. Specifically, using institutional connections to the St. Petersburg Chamber of Commerce and the Pinellas County Economic Development Commission USFSP will be able to rapidly expand connections with local companies for students in this program.

USFSP intends to seek additional internship and employer connections and partnerships. The College of Arts and Sciences recently hired an Internship Coordinator who works closely with the USFSP Career Center. The Career Center also has an Employer Relations Coordinator/Career Counselor, whose (partial) role is to conduct employer development in seeking new employers in areas where students are seeking employment. With Handshake USFSP can seek out and contact new employers, streamlining the identification of internship and practicum sites with new partners. The Career Center is currently expanding, adding about 25 new internship sites and prospective employers to the system daily.

APPENDIX A

TABLE 1-A
 PROJECTED HEADCOUNT FROM POTENTIAL SOURCES
 (Baccalaureate Degree Program)

Source of Students (Non-duplicated headcount in any given year)*	Year 1		Year 2		Year 3		Year 4		Year 5	
	HC	FTE	HC	FTE	HC	FTE	HC	FTE	HC	FTE
Upper-level students who are transferring from other majors within the university**	2	2	1	0.75	0	0	0	0	0	0
Students who initially entered the university as FTIC students and who are progressing from the lower to the upper level***	10	7.5	20	15	30	22.5	45	33.75	55	41.25
Florida College System transfers to the upper level***	3	2.25	6	4.5	8	6	12	9	20	15
Transfers to the upper level from other Florida colleges and universities***	5	3.75	10	7.5	12	9	15	11.25	15	11.25
Transfers from out of state colleges and universities***	2	1.5	4	3	5	3.75	6	4.5	7	5.25
Other (Explain)***	0	0	0	0	0	0	0	0	0	.
Totals	22	17	41	30.75	55	41.25	78	58.5	97	72.75

* List projected annual headcount of students enrolled in the degree program. List projected yearly cumulative ENROLLMENTS instead of admissions.

** If numbers appear in this category, they should go DOWN in later years.

*** Do not include individuals counted in any PRIOR CATEGORY in a given COLUMN.

APPENDIX A

**TABLE 2
PROJECTED COSTS AND FUNDING SOURCES**

Instruction & Research Costs (non-cumulative)	Year 1								Year 5						
	Funding Source							Subtotal columms 1+...+7	Funding Source						Subtotal columms 9+...+ 14
	Reallocated Base* (E&G)	Enrollment Growth (E&G)	New Recurring (E&G)	New Non-Recurring (E&G)	Contracts & Grants (C&G)	Philanthropy Endowments	Enterprise Auxiliary Funds		Continuing Base** (E&G)	New Enrollment Growth (E&G)	Other*** (E&G)	Contracts & Grants (C&G)	Philanthropy Endowments	Enterprise Auxiliary Funds	
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	
Faculty Salaries and Benefits	121,662	0	213,300	0	0	0	0	\$334,962	621,599	0	0	0	0	0	\$621,599
A & P Salaries and Benefits	0	0	0	0	0	0	0	\$0	0	0	0	0	0	0	\$0
USPS Salaries and Benefits	0	0	0	0	0	0	0	\$0	0	0	0	0	0	0	\$0
Other Personal Services	0	6,000	0	0	0	0	0	\$6,000	0	6,000	0	0	0	0	\$6,000
Assistantships & Fellowships	0	0	0	0	0	0	0	\$0	0	0	0	0	0	0	\$0
Library	0	8,000	0	0	0	0	0	\$8,000	0	24,000	0	0	0	0	\$24,000
Expenses	0	0	6,000	45,000	0	0	0	\$51,000	0	0	0	0	0	0	\$0
Operating Capital Outlay	0	0	0	0	0	0	0	\$0	0	0	0	0	0	0	\$0
Special Categories	0	0	0	0	0	0	0	\$0	0	0	0	0	0	0	\$0
Total Costs	\$121,662	\$14,000	\$219,300	\$45,000	\$0	\$0	\$0	\$399,962	\$621,599	\$30,000	\$0	\$0	\$0	\$0	\$651,599

*Identify reallocation sources in Table 3.

**Includes recurring E&G funded costs ("reallocated base," "enrollment growth," and "new recurring") from Years 1-4 that continue into Year 5.

***Identify if non-recurring.

Faculty and Staff Summary

	Year 1	Year 5
Total Positions		
Faculty (person-years)	2.63	3.28
A & P (FTE)	0	0
USPS (FTE)	0	0

Calculated Cost per Student FTE

	Year 1	Year 5
Total E&G Funding	\$399,962	\$651,599
Annual Student FTE	17	72.75
E&G Cost per FTE	\$23,527	\$8,957

Table 2 Column Explanations

Reallocated Base* (E&G)	1	E&G funds that are already available in the university's budget and will be reallocated to support the new program. Please include these funds in the Table 3 – Anticipated reallocation of E&G funds and indicate their source.
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Board of Trustees Meeting - New Business - Consent agenda

Enrollment Growth (E&G)	2	Additional E&G funds allocated from the tuition and fees trust fund contingent on enrollment increases.
New Recurring (E&G)	3	Recurring funds appropriated by the Legislature to support implementation of the program.
New Non-Recurring (E&G)	4	Non-recurring funds appropriated by the Legislature to support implementation of the program. Please provide an explanation of the source of these funds in the budget section (section III. A.) of the proposal. These funds can include initial investments, such as infrastructure.
Contracts & Grants (C&G)	5	Contracts and grants funding available for the program.
Philanthropy Endowments	6	Funds provided through the foundation or other Direct Support Organizations (DSO) to support of the program.
Enterprise Auxiliary Funds	7	Use this column for continuing education or market rate programs and provide a rationale in section III.B. in support of the selected tuition model.
Subtotal columns 1+...+7	8	Subtotal of values included in columns 1 through 7.
Continuing Base** (E&G)	9	Includes the sum of columns 1, 2, and 3 over time.
New Enrollment Growth (E&G)	10	See explanation provided for column 2.
Other*** (E&G)	11	These are specific funds provided by the Legislature to support implementation of the program.
Contracts & Grants (C&G)	12	See explanation provided for column 5.
Philanthropy Endowments	13	See explanation provided for column 6.
Enterprise Auxiliary Funds	14	Use this column for continuing education or market rate programs and provide a rationale in section III.B. in support of the selected tuition model.
Subtotal columns 9+...+ 14	15	Subtotal of values included in columns 9 through 14.

APPENDIX A

**TABLE 3
ANTICIPATED REALLOCATION OF EDUCATION & GENERAL FUNDS***

Program and/or E&G account from which current funds will be reallocated during Year 1	Base before reallocation	Amount to be reallocated	Base after reallocation
Math Faculty Salary and Benefits	237,276	121,662	\$115,614
Totals	\$237,276	\$121,662	\$115,614

* If not reallocating funds, please submit a zeroed Table 3

APPENDIX A

**TABLE 4
ANTICIPATED FACULTY PARTICIPATION**

Faculty Code	Faculty Name or "New Hire" Highest Degree Held Academic Discipline or Speciality	Rank	Contract Status	Initial Date for Participation in Program	Mos. Contract Year 1	FTE Year 1	% Effort for Prg. Year 1	PY Year 1	Mos. Contract Year 5	FTE Year 5	% Effort for Prg. Year 5	PY Year 5
A	Maria Leite, Ph.D. Mathematics, Environmental Modeling	Assistant Professor	Tenure-Track	Fall 2018	9	0.75	0.25	0.19	9	0.75	0.25	0.19
A	Edwin Abaquita, Ph.D. Electrical Engineering	Instructor I	MYA	Fall 2018	9	0.75	0.25	0.19	9	0.75	0.25	0.19
A	Armando Hoare, Ph.D. Mathematics	Instructor I	MYA	Fall 2018	9	0.75	1.00	0.75	9	0.75	1.00	0.75
A	Varol Kayhan, Ph.D. Business Administration	Associate Professor	Tenured	Fall 2020	9	0.75	0.00	0.00	9	0.75	0.125	0.09
A	Han Reichgelt, Ph.D. Cognitive Science (Business)	Professor	Tenured	Fall 2020	9	0.75	0.00	0.00	9	0.75	0.125	0.09
A	William Sinclair, M.S. Accounting	Instructor I	MYA	Fall 2020	9	0.75	0.00	0.00	9	0.75	0.125	0.09
A	Richard Smith, Ph.D. Economics	Associate Professor	Tenured	Fall 2020	9	0.75	0.00	0.00	9	0.75	0.125	0.09
A	Martina Schmidt, Ph.D. Finance	Instructor III	MYA	Fall 2020	9	0.75	0.00	0.00	9	0.75	0.125	0.09
A	Stephen Diasio, Ph.D. Management Science	Instructor I	MYA	Fall 2020	9	0.75	0.00	0.00	9	0.75	0.125	0.09
A	Michael Luckett, Ph.D. Business Administration	Associate Professor	Tenured	Fall 2020	9	0.75	0.00	0.00	9	0.75	0.125	0.09
C	New Hire, Ph.D. Math/Statistics	Professor/As soc. Prof.	Tenured	Fall 2018	9	0.75	1.00	0.75	9	0.75	1.00	0.75
C	New Hire, Ph.D. Math/Statistics	Assistant Professor	Tenure-Track	Fall 2018	9	0.75	1.00	0.75	9	0.75	1.00	0.75

Worksheet Table 4 Faculty

APPENDIX B: Signature of the Equal Opportunity Officer and the Library Director

Please include the signature of the Equal Opportunity Officer and the Library Director.

Signature of Equal Opportunity Officer

Date

Cyril Cardwell

October 2, 2017

Signature of Library Director

Date

This appendix was created to facilitate the collection of signatures in support of the proposal. Signatures in this section illustrate that the Equal Opportunity Officer has reviewed section III of the proposal and the Library Director has reviewed sections X.A and X.B.

APPENDIX B: Signature of the Equal Opportunity Officer and the Library Director

Please include the signature of the Equal Opportunity Officer and the Library Director.



Signature of Equal Opportunity Officer

10/4/17

Date

Signature of Library Director

Date

This appendix was created to facilitate the collection of signatures in support of the proposal. Signatures in this section illustrate that the Equal Opportunity Officer has reviewed section II.E of the proposal and the Library Director has reviewed sections X.A and X.B.



APPENDIX C: Program Assessment

Academic Learning Compacts
Mathematics: Computational & Applied

Fall 2018 – Spring 2019
Due tbd

Academic Program-linked College Mission-based Goals/Objectives

In the matrix on the following page, please place an X in the grid that identifies the degree program goals and objectives that align with the institutional mission-based goals/objectives and the College based goals/objectives. These goals/objectives need to be documented in your ALC data.

UNIVERSITY OF SOUTH FLORIDA ST. PETERSBURG GOALS & OBJECTIVES		COLLEGE OF ARTS & SCIENCES GOALS & OBJECTIVES		UNDERGRADUATE PROGRAMS											
				Anthropology	Biology	Natural & Applied Mathematics	Criminology	Literature & Writing	Environmental Science (BA)	Graphic Design	Political Science	Psychology	History	I.S.S.	Journalism (BA)
Academic Performance	Use sustained evidence of SLO's and student achievement for continuous improvement	Initiate and expand undergraduate programs and develop formal academic ties to other graduate programs within the USF system			X										
	Offer certificate, undergraduate and graduate programs that meet regional needs				X										
	Implement and support information and instructional technologies that facilitate effective pedagogies				X										
	Enhance programs that specifically support academic excellence				X										
	Increase student awareness of participating in a global society				X										
Student Engagement	Create a freshman experience that enables students to thrive and move successfully through to graduation	Our students will have critical skills and a broad outlook that will make them engaged and productive citizens			X										
	Foster institutional pride and strengthen connections within the campus community				X										
	Enhance opportunities for increased student involvement in curricular and co-curricular activities		Incorporate civic engagement, service learning, and experiential learning into their classes, when appropriate			X									
Diversity & Inclusion	Insure an inclusive community where differences are respected and valued	Cultivate a vigorous liberal arts culture by recruiting talented diverse students, maintaining small class sizes, and mentoring those students we have.			X										
	Attract and retain a diverse student population				X										
	Increase the diversity of faculty and staff		Encourage free discussion, foster critical thinking, demand that our students write, and work across disciplines			X									
Research & Creative Activities	Create a vibrant culture of faculty research and creative scholarship	Make significant and meaningful contributions to ongoing dialogues in our academic fields. We expect our undergraduate and graduate students to engage in research in collaboration with faculty			X										
	Promote and support undergraduate research as a meaningful aspect of campus life				X										
	Enhance and support research and scholarly collaborations with community partners					X									



Academic Learning Compacts

BS Mathematics: Computational & Applied

Signature Page for Academic Program

Academic Program: Mathematics: Computational & Applied

Person Responsible:

Summary Statement – Academic Program Performance in Fall 2018 & Spring 2019

Provide a summary statement about the academic program performance over the previous year including high points & low points.

ALC GOALS ESTABLISHED FOR DATA COLLECTION: 2018 – 2019

Mission of Academic Program (include URL):

The Bachelor of Science degree program in Mathematics: Computation & Applied at University of South Florida St. Petersburg will prepare graduates for careers in mathematics, statistics, data analytics, and fields which rely on workers with excellent quantitative skills or for post baccalaureate degrees in related programs in mathematics or statistics. Graduates of this proposed program may be employed in a wide array of industries including aerospace, banking, computing, consulting, data analytics, electronics, energy, finance, government, medical device development, transportation, and many others or pursue graduate degrees in related programs in mathematics or business.

Degree Prerequisites (15 credits beyond courses which are already included in General Education requirements):

- COP 2030 – Programming Concepts (3 credits)
- STA 2023 – Introductory Statistics I (3 credits, also for general education)
- MAC 2311 – Calculus I (4 credits, also for general education)
- MAC 2312 – Calculus II (4 credits)
- MAC 2313 – Calculus III (4 credits)
- MAP 2302 – Differential Equations (3 credits)
- One general education lab science course (4 credits total: 3 credits for general education and 1 credit for lab)

Required Core Courses (36 credits):

Mathematics – Discrete Requirements

- MAD 3107 – Discrete Mathematics (3 credits)
- MAD 4401 – Numerical Analysis I (3 credits)

Mathematics – Applied Requirement

- MAP 4310 – Mathematical Modelling (3 credits)

Mathematics – Algebraic Structures Requirement

- MAS 3105 – Linear Algebra I (3 credits)
- MAS 3156 – Vector Calculus (3 credits)

Mathematics – Geometry Requirement

- MTG 3212 – Geometry (3 credits)

Mathematics—General and Finite Requirement

- MGF 3301 – Bridge to Advanced Mathematics (3 credits)

Probability and Statistics Requirements

- STA 3024 – Introductory Statistics II (3 credits)
- STA 4201 – Computational Methods for Applied Statistics (3 credits)
- STA 4442 – Introduction to Probability (3 credits)

Additional Requirements

- MAT 4930 – Senior Capstone (3 credits)
- MAT 4940 – Senior Internship (3 credits)
- Students will complete a concentration of their choice

Concentration: Mathematics

Electives (select 18 credits from the elective courses below)

- MAA 4211 – Intermediate Analysis I (3 credits)
- MAD 4203 – Combinatorial Analysis I (3 credits)
- MAD 4301 – Introduction to Graph Theory (3 credits)
- MAD 4471 – Introduction to Cryptography and Coding Theory (3 credits)
- MAS 4301 – Elementary Abstract Algebra (3 credits)
- MAS 4214 – Elementary Number Theory (3 credits)
- MTG 4214 – Modern Geometry (3 credits)
- MHF 4403 – The Early History of Mathematics (3 credits)
- MHF 4406 – The History of Modern Mathematics (3 credits)

Concentration: Data Analytics & Business Intelligence Concentration

(18 credits)

- ACG 2021 – Principles of Financial Accounting (3 credits)
- ECO 2013 – Economic Principles (Macroeconomics) (3 credits)(This course should be taken to meet the Social Science general education requirement)
- FIN 3403 – Principles of Finance (3 credits)
- MAR 3023 – Basic Marketing (3 credits)
- MAN 3025 – Principles of Management (3 credits)
- ISM 4930 – Predictive Analytics (3 credits)
- ISM 4930 – Data Visualization (3 credits)

COURSE ASSESSMENT DATA TABLES for 2018-2019

1. Content/Discipline Skills				
Goals/Objectives	Means of Assessment/ Corroborating Evidence* 2018-2019	Criteria for Success 2018-2019	Findings 2018-2019	Plan for Use of Findings in Fall 2019 & Spring 2020
1a. Demonstrate mastery of the knowledge, skills, and abilities related to their program of study in computational and applied mathematics	1a. Performance on cumulative final exam in MAC 2313, MAD 4401, and STA 4201	1a. At least 70% of students will attain a score of 80% or better on these exams	1a.	1a.
	1a. Capstone final project/presentation	1a. At least 70% of students will attain a rating of acceptable or better on final project	1a.	1a.
	1a. Internship final report	1a. At least 70% of students will attain a rating of acceptable or better from their internship supervisor and from their self-reflection	1a.	1a.
1b. Recognize and apply connections between computational and applied mathematics and other fields and disciplines	1b. Capstone final project	1b. At least 80% of all students will earn an acceptable or higher in the related portion of their final project.	1b.	1b.
	1b. Internship final report	1b. At least 80% of all students will earn an acceptable or higher in the related portion of their final reflection.	1b.	1b.

2. Communication Skills				
Goals/Objectives	Means of Assessment/ Corroborating Evidence* 2018-2019	Criteria for Success 2018-2019	Findings 2018-2019	Plan for Use of Findings in Fall 2019 & Spring 2020
2a. Communicate their understanding of the utility of computational and applied mathematics to others, whether as part of their careers or in pursuit of advanced degree	2a. Capstone final project	2a. At least 80% of all students will earn an acceptable or higher in the related portion of their final project.	2a.	2a.
	2a. Internship final report	2a. At least 80% of all students will earn an acceptable or higher in the related portion of their final reflection.	2a.	2a.

3. Critical Thinking Skills				
Goals/Objectives	Means of Assessment/ Corroborating Evidence* 2018-2019	Criteria for Success 2018-2019	Findings 2018-2019	Plan for Use of Findings in Fall 2019 & Spring 2020
3a. Reason effectively and rigorously in various areas of computational and applied mathematics	3a. STA 3024 Students complete project that involves drawing inferences using statistical procedures	3a. At least 70% of students will attain a score of 80% or better on these projects	3a.	3a.
	3a. STA 4201 Students complete project that involves drawing inferences using statistical procedures	3a. At least 70% of students will attain a score of 80% or better on these projects	3a.	3a.
	3a. MAD 3107 Students use reasoning and logic to address applied project	3a. At least 70% of students will attain a score of 80% or better on these projects.	3a.	3a.
3b. Think critically and creatively as they solve applied problems related to mathematics	3b. COP 2030 Students use programming skills to complete computer programming project	3b. At least 70% of students will attain a score of 80% or better on these projects	3b.	3b.
	3b. MAP 3103 students develop and apply mathematical models to problems in social life, physical, and/or management sciences	3b. At least 70% of students will attain a score of 80% or better on these projects	3b.	3b.

4. Civic Engagement:				
Goals/Objectives	Means of Assessment/ Corroborating Evidence* 2018-2019	Criteria for Success 2018-2019	Findings 2018-2019	Plan for Use of Findings in Fall 2019 & Spring 2020
4a. Demonstrate engagement with community partners.	4a. MAT 4940--Internship.	4a. At least 90% of students completing internship will have positive reference letters and will receive a grade of satisfactory	4a.	4a.
	4a. Active membership in at least one math related club	4a. At least 50% of students in this major will be a member of at least one math related club.	4a.	4a.
	4a. Students volunteer at MathCOUNTS, Girls Who Code, Science Fair or other STEM related event	4a. At least 50% of students in this major will volunteer at least once this year	4a.	4a.
	4a. Tutoring or peer support	4a. At least 50% of students in this major will provide tutoring or other peer support in mathematics or related areas	4a.	4a.

5. Multiculturalism/Diversity:				
Goals/Objectives	Means of Assessment/ Corroborating Evidence* 2018-2019	Criteria for Success 2018-2019	Findings 2018-2019	Plan for Use of Findings in Fall 2019 & Spring 2020
5a. Demonstrate the ability to understand the relationship between mathematics and society	5a. MAT4930 Capstone students complete project or presentation addressing aspects of the relationships between math and society	5a. At least 70% of students will attain a score of 80% or better on these projects	5a.	5a.
	5a. MHF 4400 Students complete project or presentation addressing aspects of the relationships between math and society.	5a. At least 70% of students will attain a score of 80% or better on these projects	5a.	5a.

APPENDIX D: Course Catalog (proposed)

B.S. in Computational and Applied Mathematics (CIP 27.0304)

Total Degree Hours: 120

The Mathematics: Computation & Applied Bachelor of Science degree at University of South Florida St. Petersburg will prepare graduates for careers in mathematics, statistics, data analytics, and other fields which rely on workers with excellent quantitative skills or for entry into post baccalaureate degrees in related programs in mathematics or statistics. Graduates may be employed in a wide array of industries including aerospace, banking, computing, consulting, data analytics, data sciences, electronics, energy, finance, government, medical device development, transportation, and many others.

Students must complete 120 course hours, including all required prerequisite and core courses, and a concentration. The curriculum includes all university and college degree requirements.

- Minimum of 120 earned semester hours with overall 2.00 GPA, including all courses attempted within the USF System;
- A transfer student must have a minimum USF GPA of 2.0 or higher and an overall GPA of 2.0 or higher;
- Complete a minimum of 30 credit hours at USFSP;
- Complete a minimum of 20 credit hours in the major at USFSP;
- Satisfactorily complete writing and computation course requirements of 6A-10.030;
- Earn a minimum of 42 semester hours of upper-level work (courses numbered 3000 and above);
- Complete all Liberal Arts Requirements;
- Complete program requirements; and
- Be recommended for graduation by the Dean of the College of Arts and Sciences.

University General Education Requirements (36 hours)

- Six (6) hours credit in English
- Six (6) hours credit in Mathematics (can be fully met with program prerequisite courses)
- Six (6) hours credit in Natural Sciences (3 hours also meet program prerequisites)
- Six (6) hours credit in Social Sciences
- Six (6) hours credit in Humanities
- Six (6) additional hours of approved General Education electives

College of Arts and Sciences Exit Requirements (9 hours)

- Six (6) hours credit in Major Works and Major Issues
- Three (3) hours credit in Literature and Writing

Students must complete all required courses with a grade of C or better (not C-).

The Computational and Applied Mathematics program includes:

Degree Prerequisites (15 credits beyond courses which are already included in General Education requirements):

- COP 2030 – Programming Concepts (3 credits)
- STA 2023 – Introductory Statistics I (3 credits, also for general education)
- MAC 2311 – Calculus I (4 credits, also for general education)
- MAC 2312 – Calculus II (4 credits)
- MAC 2313 – Calculus III (4 credits)
- MAP 2302 – Differential Equations (3 credits)

- One general education lab science course (4 credits total: 3 credits for general education and 1 credit for lab)

The core courses are designed to provide students with a broad knowledge base in many mathematical areas and disciplines, to prepare them for a wide variety of careers or graduate work in related fields in mathematics or statistics.

Required core courses (36 credits):

Mathematics – Discrete Requirements

- MAD 3107 – Discrete Mathematics (3 credits)
- MAD 4401 – Numerical Analysis I (3 credits)

Mathematics – Applied Requirement

- MAP 4310 – Mathematical Modelling (3 credits)

Mathematics – Algebraic Structures Requirement

- MAS 3105 – Linear Algebra I (3 credits)
- MAS 3156 – Vector Calculus (3 credits)

Mathematics – Geometry Requirement

- MTG 3212 – Geometry (3 credits)

Mathematics – General and Finite Requirement

- MGF 3301 – Bridge to Advanced Mathematics (3 credits)

Probability and Statistics Requirements

- STA 3024 – Introductory Statistics II (3 credits)
- STA 4201 – Computational Methods for Applied Statistics (3 credits)
- STA 4442 – Introduction to Probability (3 credits)

Additional Requirements

- MAT 4930 – Senior Capstone (3 credits)
- MAT 4940 – Senior Internship (3 credits)
- Students will complete a concentration of their choice

Concentration: Mathematics

Electives (select 18 credits from the elective courses below)

- MAA 4211 – Intermediate Analysis I (3 credits)
- MAD 4203 – Combinatorial Analysis I (3 credits)
- MAD 4301 – Introduction to Graph Theory (3 credits)
- MAD 4471 – Introduction to Cryptography and Coding Theory (3 credits)
- MAS 4301 – Elementary Abstract Algebra (3 credits)
- MAS 4214 – Elementary Number Theory (3 credits)
- MTG 4214 – Modern Geometry (3 credits)
- MHF 4403 – The Early History of Mathematics (3 credits)
- MHF 4406 – The History of Modern Mathematics (3 credits)

Concentration: Data Analytics & Business Intelligence Concentration

(18 credits)

- ACG 2021 – Principles of Financial Accounting (3 credits)
- ECO 2013 – Economic Principles (Macroeconomics) (3 credits) (This course should be taken to meet Social Science general education requirement)
- FIN 3403 – Principles of Finance (3 credits)
- MAR 3023 – Basic Marketing (3 credits)
- MAN 3025 – Principles of Management (3 credits)
- ISM 4930 – Predictive Analytics (3 credits)
- ISM 4930 – Data Visualization (3 credits)



Market Demand for
Bachelor's-Level
**Computational and Applied
Mathematics Programming**
Analysis of Southern Florida Employer Demand

COE Forum

Claire Haynie

Market Research Associate

Laura Catalani

Senior Market Research Manager

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Table of Contents

1) Research Methodology	4
Project Challenge	4
Methodology and Definitions	4
Burning Glass Labor/Insight™	4
Project Sources	5
2) Employer and Student Demand	6
Demand over Time	6
Student Completions.....	7

1) Research Methodology

Project Challenge

Leadership at the University of South Florida—St. Petersburg approached the Forum as they considered launching a new bachelor’s-level computational and applied mathematics degree. Through a combination secondary research and quantitative data analytics, the Forum sought to assess the market viability of computational and applied mathematics program.

EAB’s market research function provides insights which guide strategic programmatic decisions at member institutions. The Forum combines qualitative and quantitative data to help administrators identify opportunities for new program development, assess job market trends, and align curriculum with employer and student demand.

EAB reports rely primarily on labor market data from the Burning Glass Labor/Insight™ tool (description below). Reports occasionally use data from the United States Census Bureau and United States Bureau of Labor Statistics data to explore occupation and job trends. Market research reports may also incorporate Integrated Postsecondary Education Data System (IPEDS) data to assess student enrollment, demographics, and completion rates across competitor programs.

Methodology and Definitions

Methodology: Unless stated otherwise, this report includes data from online job postings from August 1, 2016 to July 31, 2017.

Definitions: “Regional data” refers to five counties in southern Florida: Hillsborough, Manatee, Pasco, Pinellas, and Sarasota.

Using the Burning Glass Labor/Insight Tool, the Forum filtered job postings to show those which required a bachelor’s degree and the following skills:

- Mathematics,
- Mathematical modeling,
- Data analysis,
- Data mining,
- Data science,
- Data techniques,
- Data visualization,
- Machine learning, and
- Mathematical software.

Annual growth in job postings is measured in the change between January 2014 and June 2017 by six-month halves (i.e., H2 2014 is July 2014 to December 2014).

Burning Glass Labor/Insight™

EAB’s Partner for Real-Time Labor Market Data

This report includes data made available through EAB’s partnership with Burning Glass Technologies, a Boston-based leader in human capital data analytics. Burning Glass Technologies specializes in the use of web spidering technology to mine more than 80 million online job postings and analyze real-time employer demand. Under this partnership, EAB may use Burning Glass’s proprietary Labor/Insight™ tool to answer member questions about employer demand for educational requirements, job titles, and competencies over time, as well as by geography. The tool considers job postings “unspecified” for a skill, industry, employer, geography, certification, or educational requirement when the job posting did not advertise for one of these particular job characteristics. Unspecified postings represent null values and should

be excluded from the total number (n value) of job postings analyzed in the query. A more complete description of the tool is available at <http://www.burning-glass.com/products/laborinsight-market-analysis/>.

For more information about the Labor/Insight™ tool, please contact Betsy Denious, Director of Business Development Learning & Policy at bdenious@burning-glass.com or 301-525-6596.

Project Sources

The Forum consulted the following sources for this report:

- EAB's internal and online research libraries (eab.com)
- National Center for Education Statistics (NCES) (<http://nces.ed.gov/>)

2) Employer and Student Demand

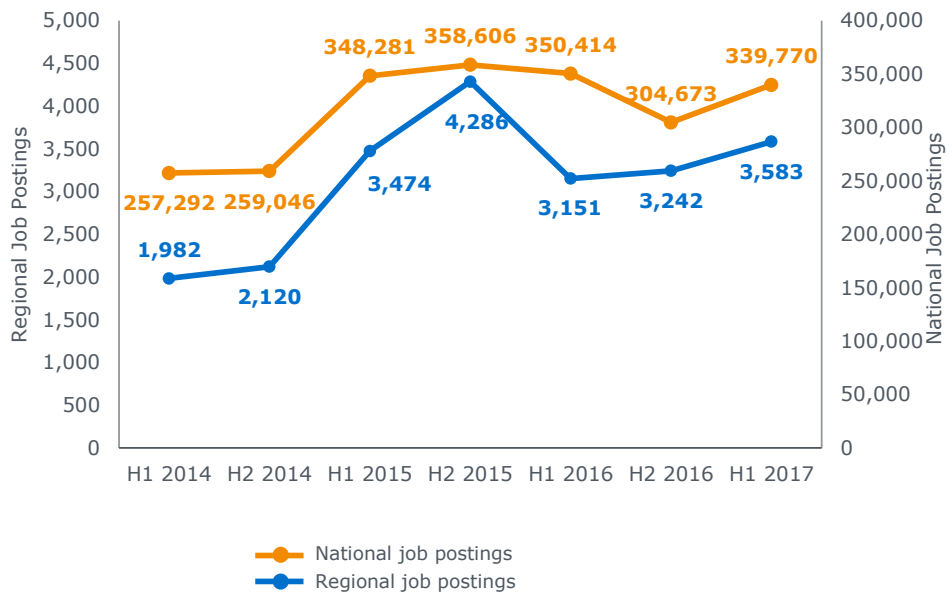
Demand over Time

Regional Demand for Bachelor’s-Level Computational and Applied Mathematics Professionals Increased 79 Percent

Regional employers posted 79 percent more bachelor’s-level computational and applied mathematics-related positions from H1 2014 to H1 2017. Demand reached a peak in H2 2015 with 4,286 postings before decreasing in H1 2016. National demand follows a similar pattern, with demand reaching a peak in H2 2015.

Historical Demand for Bachelor’s-Level Computational and Applied Mathematics Professionals

January 2014-June 2017, National and Regional Data¹



The Bureau of Labor Statistics Predicts Strong Growth for Occupations Related to Computational and Applied Mathematics

The Bureau of Labor Statistics (BLS) projects an average of seven percent growth across all occupations nationwide between 2014 and 2024. The BLS predicts occupations which require skills gained in a bachelor’s-level degree in computational and applied mathematics to experience above-average growth. Employment of mathematicians is expected to rise 21 percent, computer and information research scientists 11 percent, and software developers 17 percent.² The BLS attributes the growth of these occupations to the increasing demand for computer software needed to accommodate the increasing volume of digital and electronic data. Companies report difficulties in finding these highly skilled workers, and as such, bachelor’s-level computational and applied mathematics professionals enjoy good job prospects.

1) Burning Glass Labor/Insight™

2) The Bureau of Labor Statistics Occupational Outlook Handbook: [Software Developers](#), [Computer and Information Research Scientists](#), and [Mathematicians](#).

Student Completions

Florida Institutions Report a 49 Percent Increase in Degree Completions of Bachelor’s-Level Mathematics and Statistics Programs between 2011 and 2015

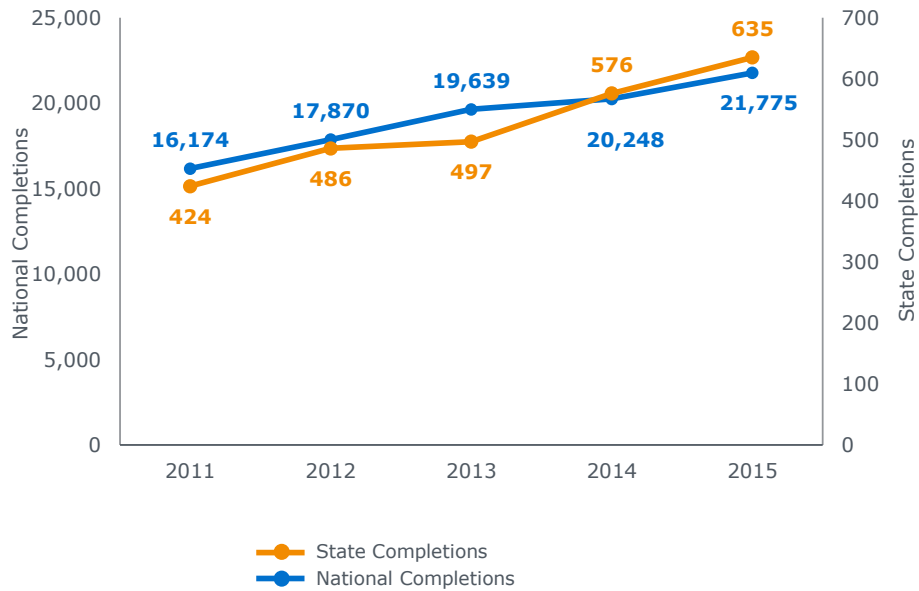
Nationwide, student completions of bachelor’s-level mathematics and statistics programs increased 35 percent between 2011 and 2015 (i.e., from 16,174 graduates in 2011 to 21,775 graduates in 2015), according to the most recent year of available data (i.e., 2015).³ Within the state of Florida, graduates of mathematics and statistics-related bachelor’s degree programs increased by 49 percent, from 424 graduates in 2011 to 635 graduates in 2015. 30 state institutions reported at least one graduate from a mathematics and statistics between 2011 and 2015. The schools in Florida with the highest number of bachelor’s-level mathematics and statistics graduates in 2015 include:

- University of Florida: 134 graduates
- Florida State University: 103 graduates
- University of South Florida-Main Campus: 65 graduates
- University of Central Florida: 53 graduates
- University of Miami: 43 graduates

Degree Completions of Bachelor’s-Level Mathematics and Statistics Programs

2011-2015, State and National Data⁴

The Forum identified completions using the following CIP Code: 27 (Mathematics and Statistics)



3) [National Center for Education Statistics.](#)
 4) [National Center for Education Statistics.](#)

APPENDIX F: Faculty Curriculum Vitae

Edwin Abaquita, M.S.

Armando Hoare, Ph.D.

Maria Leite, Ph.D

Steven Diasio, Ph.D., (Kate Tiedemann College of Business, Data Analytics concentration only)

Varol Kayhan, Ph.D., (Kate Tiedemann College of Business, Data Analytics concentration only)

Michael Luckett, Ph.D., (Kate Tiedemann College of Business, Data Analytics concentration only)

Han Reichgelt, Ph.D., (Kate Tiedemann College of Business, Data Analytics concentration only)

Martina K. Schmidt, Ph.D., (Kate Tiedemann College of Business, Data Analytics concentration only)

William Sinclair, (Kate Tiedemann College of Business, Data Analytics concentration only)

Richard Smith, Ph.D., (Kate Tiedemann College of Business, Data Analytics concentration only)

Edwin V. Abaquita, M.S.

4109 23rd Avenue North
St. Petersburg, FL 33713

Telephone: (727) 323-9556
E-mail: eabaquit@mail.usf.edu

Research interests: Linear Statistical Models and Nonlinear Models

Published papers:

1. Abaquita, Edwin V., “Development of a Microcomputer Remote Controlled 3-DOF Mini Robot with Interactive Graphic Simulation”, DLSU, 1996.

<http://lib1000.dlsu.edu.ph/record=b1205890>

2. Abaquita, Edwin V. , “Developing a Microcomputer Remote Controlled “Krik” Mini Robot”, USC Journal Vol. XX No. 2 , 2004.

Recently completed USF graduate math courses:

MAT 6932 – Design of Experiments – 3 credit hours

MAT 5932 - Reliability – 3 credit hours

STA 6208 – Linear Statistical Models – 3 credit hours

STA 6167 – Statistical Methods II – 3 credit hours

MAT 5933 – Nonlinear Analysis II – 3 credit hours

MAT 5932 – Nonlinear Analysis I – 3 credit hours

Awards:

Excellence in Teaching Award, one in College (SPC) and two in High School (PMI)
Recipient, Department of Science and Technology Scholarship Award, Graduate program Recipient,
Academic Scholarship Award, Undergraduate program

Teaching Certificates (State of Florida-expires June 2022, Florida Department of Education No. 921152):

1. Professional Educator’s Certificate in Math 6-12
2. Professional Educator’s Certificate in Computer Science K-12

Employment:

University of South Florida – St Petersburg

August 2013 to present

College of Arts and Sciences

140 7th Avenue South

St. Petersburg, FL 33701-5016

Mrs. Kathleen Gibson-Dee., Math Academic Coordinator

Hired as Math Instructor. Teach the following courses:

1. MAC 1105 - College Algebra

2. MGF 1106 - Finite Mathematics
3. MAC 1147 – Pre-calculus

University of South Florida – St Petersburg

January 2013 to August 2013

College of Arts and Sciences
140 7th Avenue South
St. Petersburg, FL 33701-5016
Mrs. Kathleen Gibson-Dee, Math Academic Coordinator

Hired as Adjunct Math Instructor. Taught the following courses:

1. MAC 1105 - College Algebra
2. MGF 1106 - Finite Mathematics

St. Petersburg College

August 2010 to August 2013

Department of Mathematics
Social Arts Building (SA) 215
6605 Fifth Avenue North
St. Petersburg, FL 33710
(727) 341-3573
Mr. David Kolonoski, Math Academic Chair

Hired as Adjunct College Math Instructor. Taught the following subjects:

1. MAT 0018 - Developmental Math I
2. MAT 0028 - Developmental Math II
3. MAT 1033 - Intermediate Algebra
4. MAT 0022 – Bridge of Success: Math
5. MAT 1100 – Exploration in Mathematics and Quantitative Reasoning
6. MGF 1106 - Mathematics for Liberal Arts 1
7. MGF 1107 – Mathematics for Liberal Arts 2
8. MAC 1105 - College Algebra
9. STA 2023 – Introduction to Statistics

Hillsborough Community College

August 2012 to August 2013

Department of Mathematics
P.O. Box 30030
Tampa, FL 33630-3030
(727) 341-3573
Mr. Robert Hervey, Math Academic Program Manager

Hired as Adjunct College Math Instructor. Taught the following subjects:

1. MAT 0018 - Developmental Math I
2. MAT 0028 - Developmental Math II

Pinellas Marine Institute

August 2004 to March 2010

3101 Gulf Boulevard
St. Pete Beach, FL 33706
(727) 471-0390

Ms. Patty Burrows, Director of Education

Hired as Full-time Certified Math Teacher for Middle and High School youth at risk. Taught the following subjects:

1. Math 6-12
2. Pre-Algebra
3. Algebra 1A
4. Algebra 1B
5. Geometry
6. Business Math
7. Lib. Arts Math
8. Algebra 2

Also, taught computer science classes.

Schiller International University

January 2008 to May 2009

300 East Bay Dr
Largo, FL 33770
(727)738-6379

Dr. Lyman Hussey, Director

Hired as Adjunct Faculty in M.S. in Computer Engineering graduate program. Taught the following graduate subjects:

1. CE501 – Fundamentals of Electrical Engineering
2. CE509 – Computer Architecture

ITT Technical Institute

August 2008 to December 2008

3491 Gandy Blvd., Suite 101
Pinellas Park, FL 33781
(727)209-4700

Natasha Thompson, Chair

Hired as Adjunct Faculty in Electronics Technology program. Taught the following subject:

1. ET 255 – Digital Electronics

Central Florida College

February 2007 to January 2009

6565 Ulmerton Road
Largo, FL 33771
(727) 531-5900

Barbara Doran, Director

Hired as Adjunct Faculty. Taught the following subjects:

1. GE 202 College Math
2. GE 207 College Algebra

University of San Carlos

October 1999 to May 2004

Department of Computer Engineering
Nasipit, Talamban, Cebu City

Philippines

(6332) 344 -3801

Dr. Jomari Maja, Chairman

Hired as Full-time Teacher with a rank of **Assistant Professor** . Assigned as Project Coordinator, Adviser and Panelist. Developed teaching course materials. Taught the following subjects:

1. Microprocessor Systems
2. Switching Theory & Logic Circuit
3. Probability & Statistics
4. Advanced Engineering Math
5. Computer Fundamentals & Programming
6. Microcomputer Hardware Design
7. Numerical Methods
8. Computer Systems Architecture & Interfacing Tech.
9. Elements of Research
10. Design Project
11. Computer Organization with Assembly Language
12. Advanced Logic Circuit Analysis and Design

University of San Carlos

June 1999 to October 2002

Department of Graduate Engineering

Nasipit , Talamban, Cebu City

Philippines

(6332) 344 -3801

Dr. Nic Buenconsejo, Chairman

Hired as Part-time Teacher with a rank of Assistant Professor. Taught Robotics, Advanced Engineering Math and Advanced Computer Programming subjects. Assigned as Thesis Adviser and Panelist.

STI College - Cebu

June 1999 to October 1999

IT Department

Salinas Drive

Lahug , Cebu City

(6332) 231-4984

Ms. Minchu Decena, Chief Operating Officer

Hired as Dean. Supervised 15 computer faculty members. Formed faculty research and development. Established a leadership culture by encouraging applied leadership skills and increased staff participation. Scheduled course offerings and give faculty loading. Developed and administered short term computer special programs. Taught Turbo C Programming subject , Math and Logic Design & Swithing. Administered Faculty Evaluation.

University of San Carlos

June 1997 to March 1998

Department of Graduate Engineering

Nasipit , Talamban, Cebu City

Philippines 6000

(6332) 344-3801

Dr. Nic Buenconsejo, Chairman

Hired as Part-time Teacher with a rank of Assistant Professor. Taught Robotics, Advanced Engineering Math and Advanced Computer Programming subjects. Assigned as Thesis Adviser and Panelist.

Page 4 of 8

STI College

June 1998 to December 1998

Central Office

Republic Glass Building

196 Salcedo Street

Legaspi Village, Makati City

Philippines 1200

(632) 818-8534

Ms. Erience Lao, Academic Manager

Hired as Teacher with a rank of Assistant Professor. Taught Computer subjects. Assigned as Dean / Thesis Coordinator at STI College Edsa Crossing branch. Handled Computer trainings. Assigned as Evaluator for STI branches faculty members who want to teach certain subjects.

University of the Visayas

June 1996 to June 1999

College of Computer Studies

Colon Street, Cebu City

Philippines 6000

(6332) 254-1702 ; 416-7991

Mr. Laurence Gullas Lucero, Assistant Vice-President

Hired as Dean. Supervised 28 computer faculty members. Formed faculty research and development. Established a leadership culture by encouraging applied leadership skills and increased staff participation. Scheduled course offerings and give faculty loading. Developed and administered short term computer special programs. Upgraded computer facilities and introduced Internet in the curriculum. Established academic and industry linkages. Taught Computer Architecture subject, math and electronics subjects in B.S. and Associate in Computer Science and Computer Technician. Taught Windows 95, Microsoft Office 97 and Internet Course.

University of Immaculate Conception

Summer 1997 and Summer 1999

Graduate School

Fr. Selga Street, Davao City

Philippines 8000

(6382) 221-8090

Dr. Alicia Sayson, Dean-Graduate School

Hired as Visiting Professor and Consultant. Handled Robotics subject in Master of Arts in Engineering Education Major in Electronics and Communication Engineering. Assisted graduate students in making their first robot prototype.

University of Mindanao

First semester School Year 1998-1999

Graduate School

Matina, Davao City

Philippines 8000

Mrs. Carmencita Vidamo, Dean-College of Engineering

Hired as Visiting Professor. Handled Data Network subject in Master of Engineering Program. Assisted graduate students in making their first computer network configuration and design.

PCI Automation Center

February, 1995 to September 1995

D A D-Microsystems

PCIBank Tower 2
Makati Avenue ,Makati City
Philippines 1200
(632) 818-3936
Mr. Bobby Reyes, Manager

Hired as Programmer. Then, later became the EDP Worstation Coordinator. Supervised 5 computer programmers. Established short term computer software and computer virus prevention and detection literacy courses. Organized the bank's mini computer software and book library by a computerized system. Formed research and development group for new computer software and hardware products. Designed some computer networks in the PCIBank main office and branch offices.

AMA Computer Learning Center

January, 1994 to September, 1994

4th Floor, Sonlie International Building
Gil Puyat corner Taft Avenue, Pasay City
Philippines 1300
(632) 831-5659
Ms. Jocelyn Lizardo, Branch Director

Hired as Part-time Computer Teacher. Taught the following subjects:

- | | |
|--|---|
| 1. Basic Electronics with laboratory experiments | 7. Fabrication and Repair of Computer |
| 2. Basic Electricity with laboratory experiments | 8. Elementary Algebra |
| 3. Pascal Programming | 9. Programming Language Formulation using Turbo Basic |
| 4. Digital Systems with laboratory experiments | 10. Programming in Turbo C |
| 5. Microprocessor Operation | 11. Instrumentation and Control with lab experiments |
| 6. Linear ICs | 12. Entry Level Computer Maintenance |

University of the Visayas

October, 1992 to October, 1993

Computer Science Department
Colon Street, Cebu City
Philippines 6000
(06332) 254-1702 ; 416-7991
Mr. Laurence Gullas Lucero, Assistant Vice-President

Hired as Systems Analyst and at the same time Computer Teacher. Maintained enrollment system - RPG program running in IBM AS/400 system. Taught all major subjects in B.S. and Associate in Computer Science.

Felipe R. Verallo Memorial Foundation, Inc.

October, 1991 to October, 1992

Clotilde Hills, Dakit
Bogo, Cebu
Philippines
Merlino Anciano, Personnel Officer

Taught all major subjects in Computer Technology , Algebra and Trigonometry.

Education:

University of South Florida
Florida, USA
2006 to 2013

Education courses - 6 credit hours
Ph.D. E.E. courses – 6 credit hours
Graduate Math courses – 12 credit hours

Note: Completed 24 graduate credit hours in math

St. Petersburg College
Florida, USA
2006

Math Education courses
28 credit hours
G.P.A. = 4.0 = “A”

University of the Philippines
Diliman, Quezon City
Philippines
2003 to 2004

Ph.D. in Electrical Engineering
12 credit hours

De La Salle University
2401 Taft Avenue,
Manila, Philippines 1004
1994 to 1996

M. S. in Manufacturing Engineering
Thesis: “ Development of a Microcomputer Remote Controlled 3-DOF
Mini Robot with Interactive Graphic Simulation.”
G.P.A. 2.826 = 87%

Cebu Institute of Technology University
N. Bacalso Avenue
Cebu City, Philippines 6000
1986 to 1991

B. S. in Computer Engineering
Design Project: “Microprocessor Controlled Centralized Book
Distributor System”
G.P.A. 4.4457 = 89%

Cebu Technical University
M. J. Cuenco Avenue
Cebu City, Philippines 6000
1982 to 1986

High School Diploma - First Honor

Tabunoc Elementary School
Tabunoc , Talisay
Cebu, Philippines
1976 to 1982

Elementary School Diploma – Valedictorian

Personal Achievements:

Graduated Valedictorian in Elementary Education. Honor Roll in High School in all 4 years. Graduated First Honor in High School Education. President of the senior class and Writer of the School Paper in High School. Received numerous awards in High School Technical Drawing. Varsity player in High School Volleyball team. Academic Scholar and Dean’s lister in College in all 5 years. Elected President of the Batch of Computer Engineering.

Graduated top 10 from the college graduating class. Awarded as Mathematician of the Year 1990 for the entire College of Engineering. Department Of Science and Technology Scholarship Grantee in Masteral Program under ESEP program (Engineering and Science Education Project). Math and Computer teacher for almost 12 years. Strong administrator with 4 years experience of about 28 faculty members heading successful implementation of good education with extensive faculty development. Maintain above average rating from teacher's evaluation conducted by students, co-teachers, and administrators. Totally familiar in extensive Research and Development; Personal Computer Repair and Troubleshooting; and all major computer programs and operating systems. Got Professional Florida teaching certificate in Math 6-12 and Computer Science K-12. Completed all education courses at St. Petersburg College and University of South Florida with all grades in "A's". Got "Employee of the month" award in Pinellas Marine Institute last June, 2007 and July, 2009. Earned first aid / CPR training. Trained in CPI (Crisis Prevention Intervention) and PAR (Protective Action Response). Got an "Excellence in Teaching Award" at St. Petersburg College on 2012.

References:

Available upon request

Armando J. Hoare

Curriculum Vitae

Contact Information

Department Address

Department of Biological Sciences
University of South Florida St Petersburg
140 7th Ave S.
St Petersburg, Florida 33701
Phone: (727) 873-4737

E-mail: ahoare2@mail.usf.edu

Academic Qualifications

Doctor of Philosophy in Mathematics with a concentration in Statistics, May 2008, University of South Florida, Tampa, FL, U.S.A; *Dissertation: Parametric, Non-Parametric and Statistical Modeling of Stony Coral Reef Data*

Master of Arts in Mathematics, 2004, University of South Florida, Tampa, FL, U.S.A.

Master of Education in Educational Leadership, Certificate of Award in Mathematics, 2002, University of North Florida, Jacksonville, FL, U.S.A.

Bachelor of Science in Mathematics and Chemistry, 1992, Regis University, Denver, CO, U.S.A.

Associates degree in Natural Science (Mathematics and Chemistry), 1990, St. John's College Sixth Form, Belize City, BZE

Special Courses and Workshop

2017 Summer Teaching Symposium (STS-04), *Gamification*, University of South Florida, Tampa, FL May 10-11

2017 Bay to Bay Learning Symposium, University of South Florida – Saint Petersburg, FL February 10

2016 Summer Teaching Symposium (STS-03), *Flip It*, University of South Florida, Tampa, FL May 11-12

2016 Bay to Bay Learning Symposium, University of South Florida – Saint Petersburg, FL February 12

2015 Summer Teaching Symposium (STS-02), *The Science of Learning*, University of South Florida, Tampa, FL

Workshop for Interdisciplinary and Inquiry Based Teaching of Calculus, University of South Florida, Tampa 2014

Numerical Analyses of Biological and Environmental Data, University College of London, UK, 2011

American Diploma Project (ADP) Algebra II judgment study workshop, in Cleveland, Ohio, 2009

The Statistics of Environmental Impact, online course, 2005

Main Research Interest

Statistical Modeling
Statistical Analysis of Environmental Problems
Forecasting Analysis

Professional Experience

2014- Present Mathematics and Statistics Upper Unit Director

University of South Florida-St Petersburg,
St Petersburg, FL

2016- 2017 Mathematics and Statistics Program Coordinator

University of South Florida-St Petersburg,
St Petersburg, FL

2014- 2016 Mathematics and Statistics Program Assistant Coordinator

University of South Florida-St Petersburg,
St Petersburg, FL

2014-Present Instructor I Mathematics

University of South Florida-St Petersburg,
St Petersburg, FL

Courses taught:

STA 5166	Statistical Methods I
MAC 2311	Calculus I
MAC 2233	Business Calculus
MAC 1147	Precalculus Algebra and trigonometry

2008-2014 Assistant Professor Mathematics

University of South Florida-St Petersburg,
St Petersburg, FL

Courses taught:

STA 5166	Statistical Methods I
STA 2023	Introductory Statistics I
MAC 2312	Calculus II
MAC 2311	Calculus I
MAC 1147	Precalculus Algebra and trigonometry
MAC 1105	College Algebra

2013-2014 Interim ESP Graduate Coordinator University of South Florida-St Petersburg, St Petersburg, FL

2007-2008 Assistant Visiting Instructor University of South Florida- St Petersburg,
St Petersburg, FL

Courses taught:

STA 5166	Statistical Methods I
STA 2023	Introductory Statistics I
MGF 1106	Finite Mathematics
MAC 1105	College Algebra

2001-2007 Graduate Teaching Associate University of South Florida, Tampa, FL

Courses taught:

MAC 2281	Engineering Calculus I
MAC 1147	Precalculus Algebra & Trigonometry
MAC 1105	College Algebra
MGF 1106	Finite Mathematics
MGF 1107	Mathematics for Liberal Arts
STA 1022	Basic Statistics

Facilitated Help Sessions For:

MAC 2230	Business Calculus
MAC 1105	College Algebra
MGF 1107	Mathematics for Liberal Arts

Grader For: STA 4442 Introduction to Probability

Summer 2006-2007

Write programs to create multiple choice questions for a test bank designed for College Algebra using MAPLE TA

Summer 2006 Adjunct Faculty USF-St. Petersburg, St. Petersburg, FL

Course taught: MAC 1105 College Algebra

Mathematics Instructor

1993-2001 St. John's College Junior College Belize City, Bze

Taught college mathematics to business and science students
 Taught Advanced Level mathematics to math majors in preparation for Cambridge Advance Level examinations
 Reconstructed mathematics curriculum for increased efficacy and for the placement of students into their desired program of study

Mathematics and Chemistry Teacher

1992-1993 San Pedro High School San Pedro, Ambergris Caye, Bze

Taught mathematics and chemistry to students sitting CXC examinations in both disciplines

Funding

Biostatistical Analyses of 2010 and 2011 Data for Gum Springs Flow Diversion Study and Periphyton Sampler Analyses, **Southwest Florida Water Management District**. PI (USD 45,000 – June 2011 – December 2012)

Data Analysis

2012 Report Biostatistical Analyses of Pre-Diversion Ecological Data and Periphyton Colonization, **Southwest Florida Water Management District**

2012 Report Antidegradation Analysis of Clam Bayou, Florida, **Florida Department of Environmental Protection, Tallahassee, Florida**

2011 Report Gum Springs Flow Diversion Study: 2010 Periphyton and Macrophyte Assessment, **Southwest Florida Water Management District**

2005, 2006 and 2007 Reports Performed the data analyses for the consultant report prepared for the **EPA** and **Florida Keys National Marine Sanctuary**, Water Quality Protection Program, Coral Reef/Hardbottom Monitoring Project, Florida Marine Institute, St. Petersburg.

Publications

Cook, M.M., Symonds, E.M., Gerber, B., **Hoare, A.**, Van Vleet, E. S. and Breitbart, M., 2016 *Removal of Six Estrogenic Endocrine-Disrupting Compounds (EDCs) from Municipal Wastewater Using Aluminum Electrocoagulation*, *Water*, 8, 128

Jaward, F.M., Alegria, H.A., Reyes, J.G.G., **Hoare, A.** 2012 Levels of PAHs in the Waters, Sediments, and Shrimps of Estero de Urias, an Estuary in Mexico, and their Toxicological Effects, *The Scientific World Journal* Doi:10.1100/2012/687034

Breithaupt, J.L., Smoak, J.M., Smith, T.J., Sanders, C.J., **Hoare, A.** 2012 *Organic Carbon Burial Rates in Mangrove Sediments: Strengthening the Global Budget*, *Global Biogeochemical Cycles*, vol. 26, GB3011 Doi:10.1029/2012GB004375

Tokotch, B., Meindl, C., **Hoare, A.** and Jepson, J. 2012 *Stakeholder Perceptions of the Northern Gulf of Mexico Grouper and Tilefish Individual Fishing Quota Program*, *Journal of Marine Policy*, 36, 34–41.

Hoare, A. and Tsokos, C. P. 2011 *Non-parametric Analysis of Stony Coral Species Diversity Data*, *Journal of Problems of Nonlinear Analysis in Engineering Systems*, 1(35), 36-56

Hoare, A. and Tsokos, C.P. 2009 *Statistical analysis and modeling of coral reef habitats*. *Nonlinear Analysis: Theory, Methods and Applications*, 71(2), 1360-1369.

Technical Reports

Hoare, A., Riedinger-Whitmore, M., Lauterman, F., Whitmore, T., Price, R. 2012 Gum Springs Flow Diversion Study: Biostatistical Analyses of Pre-Diversion Ecological Data and Periphyton Colonization, Southwest Florida Water Management District

Price, R.A., Whitmore, T. J., Riedinger-Whitmore, M.A., Kenny III, W.F., **Hoare, A.**, Stephens, T.W., and Flocks, J.G. 2012 Antidegradation Analysis of Clam Bayou, Florida, Florida Department of Environmental Protection, Tallahassee, Florida

Dixon, B., **Hoare, A.** and Riedinger-Whitmore 2011 Special Report: Graduate Program External Review Report for the Environmental Science and Policy Master's Program, University of South Florida- St. Petersburg, Florida

Riedinger-Whitmore, M., Whitmore, T. J., Slade, J.G., **Hoare, A.**, Jones, D., Jacono, C., Netherland, M. and Brenne, M. 2011 Gum Springs Flow Diversion Study: 2010 Periphyton and Macrophyte Assessment, Southwest Florida Water Management District

Tsokos, C.P., **Hoare, A.J.** 2007 Statistical Analysis of Florida Keys Coral Reef Data (1996-2006 Video Point Count Data and 1996-2006 species inventory and disease) . US EPA Florida Keys National Marine Sanctuary Water Quality Protection Program. Florida Marine Institute, St. Petersburg, Florida.

Tsokos, C.P., **Hoare, A.J.**, Yanev, G.P. Statistical Analysis of Species Inventory and Disease/Condition Coral Reef Data, 1996-2005. US EPA Florida Keys National Marine Sanctuary Water Quality Protection Program. Florida Marine Institute, St. Petersburg, Florida.

Tsokos, C.P., **Hoare, A.J.**, Yanev, G.P. 2006 Statistical Analysis of Florida Keys Coral Reef Data (1996-2005 Video Point Count Data) . US EPA Florida Keys National Marine Sanctuary Water Quality Protection Program. Florida Marine Institute, St. Petersburg, Florida.

Tsokos, C.P., **Hoare, A.J.**, Yanev, G.P. 2005 Statistical Analysis of Florida Keys Coral Reef Data (1996-2004 Video Point Count Data) . US EPA Florida Keys National Marine Sanctuary Water Quality Protection Program. Florida Marine Institute, St. Petersburg, Florida.

Grants, Scholarships, Awards Received and Achievements

- | | |
|------------------|---|
| <u>2014</u> | Lead person in the creation of an autonomous Math Unit at the University of South Florida- Saint Petersburg |
| <u>2007</u> | Certificate of Recognition for outstanding performance as a graduate teaching assistant |
| <u>2004-2006</u> | Fred L. & Helen M. Tharp End Scholarship from USF
(<i>This is awarded to the top 20 students in the Department of Mathematics and Statistics.</i>) |
| <u>2001-2008</u> | Latin American/Caribbean Scholarship |
| <u>1998</u> | St. John Berchman's Award for Teacher of the Year, St. John's College Junior College |
| <u>1992</u> | Graduation Honors: Magna Cum Laude |

1990-1992 Regis Natural Science Scholarship in Mathematics and Chemistry
(Awarded to the top 2 students on the basis of academic excellence on competitive examinations)

1991 Nominee for Alpha Sigma Nu Society for Natural Sciences

Presentations/Conferences

- 2017 The Teaching Professor Conference, St. Louis, MO June 2-4
- 2017 Pearson Sunshine Symposium in Orlando, FL February 23 -24
- 2017 Joint Meetings of FL-MAA and FTYCMA, Bradenton, FL February 17-18
- 2013 Joint Mathematics Meetings in San Diego, CA, January 9-12
- 2010 Forecasting model for rainfall precipitations in the State of Florida. Fourth International Conference on Neural, Parallel and Scientific Computations, Atlanta, GA. (Oral Presentation)
- 2008 Statistical analysis and modeling of coral reef habitats. Fifth World Congress of Nonlinear Analysts, Orlando, FL. (Oral Presentation)
- 2005 Statistical Analysis of Coral Reef Data. Statistics Seminar: Frontiers in Statistics. University of South Florida, Tampa, FL. (Oral presentation)
- 1992 Chromium (VI) Co-oxidation of Maleic Acid and Citric Acid: Reaction Products. Sixth Undergraduate Research Conference in Chemistry. Minneapolis, MN. (Poster presentation)
- 1992 Chromium (VI) Co-oxidation of Maleic Acid and Citric Acid: Reaction Products. Undergraduate Research Symposium in Chemistry. Greeley, CO. (Oral presentation)

Published Abstracts/Poster

Beckhorn, R.M., Smoak, J.M., Poore, R.Z., **Hoare, A.** 2013 *700-year record of sea-surface temperature variability derived from Mg/Ca in planktonic foraminifera from the northern Gulf of Mexico*, Florida Statewide Graduate Student Research Symposium, USF Tampa, Florida

Riedinger-Whitmore, M.A., Whitmore, T.J., **Hoare, A.**, M., Price, R., Lauterman, F. 2013 *Inter-annual, Substrate, and Seasonal Variation in Pheriphyton Communities in a Subtropical, Spring-fed Florida Stream*. ASLO, New Orleans, Louisiana.

Breithaupt, J. L., Smoak, J.M., Smith III, T.J., Sanders, C.J., **Hoare, A.** 2012. *Strengthening the Century-Scale Global Estimate of Mangrove Organic Carbon Burial Rates*. 9th INTECOL International Wetlands Conference, Orlando, Florida.

Price, R., Whitmore, T.J., Riedinger-Whitmore, M.A., Kennedy, W.F., **Hoare, A.**, Flocks, J.G. 2012 *Historical Analysis of Polycyclic Aromatic hydrocarbon, Pesticide, and Metal Contamination in Clam Bayou, Florida*, 9th INTECOL International Wetlands Conference, Orlando, Florida

Beckhorn, R.M., Smoak, J.M., Poore, R.Z., **Hoare, A.** 2012 *400 year long record of mean annual and winter sea-surface temperatures derived from Mg/Ca in planktonic foraminifera from the Fisk Basin in the northern Gulf of Mexico*, Graduate Expo, USFSP

Professional Affiliations

American Statistical Association
Institute of Mathematical Statistics
American Mathematical Society

Languages

English, Spanish

Computer Skills

Experienced in SAS, R, S-Plus, SPSS, Minitab, MAPLE, MAPLE T.A., MatLab, Primer-e, Excel.

University, College, Department committees

- Upper Unit Director, Mathematics Fall 2014 to present
- Interim Program Coordinator, Mathematics Fall 2016 to Summer 2016.
- Assistant Program Coordinator , Mathematics Fall 2014 – Summer 2016
- Interim Graduate Coordinator, ESP Spring 2013 - Spring 2014
- Member of CAS Faculty Council (Fall 2010 – Spring 2012)
- Member of ESP&G Graduate Committee (Fall 2010 – 2014)
- Member of ESP&G Ad hoc balloting committee (Fall 2009-2014)
- Member of ESP&G Bylaws committee (Fall 2008 – 2014)
- Member of ESP&G Annual review Committee (2012 and 2013)
- Member of ESP&G Ad hoc workload committee (Fall 2009)
- ESP Comprehensive Exam examiner (Summer 2008, 2009; Spring 2009, 2010, 2011, 2012, 2013, 2014; and Fall 2009, 2010, 2011, 2012, 2013)
- General Assessment Report: GE courses(2007 - present)
- College Algebra Common Exam panel (2008 – 2011)
- USF Panelist/Reviewer for the Internal Awards program (2009 - 2010)

Ph.D. and Master's Thesis Advisory Committees

- Monica Mion – Ph.D. committee (Department of Marine Science, USF-Tampa). *Input, Fate and Consequential Removal of Steroid Estrogens in a Sewage-Impacted Southwest Florida Marine Environment*. Completed Spring 2015
- Rita Beckhorn - Master's thesis committee (Department of Environmental Science, Policy and Geography, USF- St. Petersburg). *400 year long record of mean annual and winter sea-surface temperatures derived from Mg/Ca in planktic foraminifera from the Fisk Basin in the northern Gulf of Mexico*. Completed Spring 2014
- Joshua L. Breithaupt - Master's thesis committee (Department of Environmental Science, Policy and Geography, USF- St. Petersburg). *Blue Carbon in the Coastal Everglades: A Preliminary Measurement of Centennial-scale Burial Rates In Mangrove Soils* Completed Summer 2012

- Renee Price – Master’s thesis committee (Department of Environmental Science, Policy and Geography, USF- St. Petersburg). *Historical Analysis of Polycyclic Aromatic Hydrocarbon, Pesticide, and Metal Contamination in Clam Bayou, Florida*. Completed Spring 2012
- Renee Duffey - Master’s thesis committee (Department of Environmental Science, Policy and Geography, USF- St. Petersburg). *A multi-scale approach for characterizing habitat selection of tidal creek fish in Charlotte Harbor, Florida*. Completed Spring 2012
- Fredrik Bradley - Master’s thesis committee (Department of Environmental Science, Policy and Geography, USF- St. Petersburg). *Development of a comprehensive flow path model to determining factors contributing to the spatial variability of water quality including CDOM Concentrations in selected agricultural watersheds using GIS and RUSLE Model*. Completed Fall 2011
- Amy Wallace - Master’s thesis committee (Department of Marine Science, USF-Tampa). *Dynamics of Stony Coral Assemblages on Patch Reefs of the Upper Florida Reef Tract, Including Biscayne National Park*. Completed Spring 2011
- Kyle Buck – Master’s thesis committee (Department of Environmental Science, Policy and Geography, USF- St. Petersburg). *Assessment of Environmental and Social Factors in Cancer Risk among Teens*. Completed Spring 2011
- Jaeson Clayborn – Master’s thesis committee (Department of Environmental Science, Policy and Geography, USF- St. Petersburg). *The survivorship and foraging strategies of *Solenopsis invicta* in beach habitats of Central-West Florida*. Completed Spring 2011
- Britni Tokotch – Master’s thesis committee (Department of Environmental Science, Policy and Geography, USF- St. Petersburg). *Stakeholder Perceptions of the Gulf of Mexico Grouper and Tilefish Individual Fishing Quota Program*. Completed Fall 2010

Other Activities

- Member and Treasurer of the Society of Saint Vincent de Paul, Blessed Trinity Parish Conference from 2015 to present
- Volunteer for Lakewood High School, Saint Petersburg, Florida from 2012 to 2016.
- Judge for High School and Middle School for Science Award in 2012 Mayors Youth Showcase of Achievement, Saint Petersburg, Florida
- Coach for Southside Youth Soccer, Saint Petersburg, Florida from 2008 to 2013.
- Served as an Assistant Coach for Southside Youth Soccer, Saint Petersburg, Florida from 2006 to 2008.
- Served as a Volunteer at Douglas Jamerson Elementary School for Remedial Math Sessions and the Chess Club, Saint Petersburg, Florida.
- Served as Supervisor of Saint John’s College (SJC) Campus Ministry Project at Youth Hostel, Belize City, Belize.
- Football coach for SJC VI Form Team: Organized the first tertiary level football marathon, Belize City, Belize.
- Head of the Evaluation Committee for the Belize Football League, Belize City, Belize.
- Member of the Executive Committee for the Belize Football League, Belize City, Belize.

MARIA LEITE

Curriculum Vitae

Address: 140 Seventh Ave South

St. Petersburg, FL 33701

Email: mcleite@mail.usf.edu

Tel(O): 727.873.4801

URL: <http://faculty.usfsp.edu/mcleite>

EDUCATION

PhD in Mathematics, 7/2005

UNIVERSITY OF HOUSTON, Houston, TX

Advisor: Professor Martin Golubitsky

Master of Science in Mathematics, 12/2001

UNIVERSITY OF PORTO, Porto, Portugal

Specialization in Engineering of Quality Systems, 04/1995

US equivalency: Master of Science in Quality Compliance Engineering

WELDING AND QUALITY INSTITUTE, Porto, Portugal

Bachelor of Science in Chemical Engineering, 12/1993

UNIVERSITY OF PORTO, Porto, Portugal

Teaching Interests: Courses across the entire undergraduate curriculum. Graduate courses in dynamical systems, bifurcation theory, nonlinear dynamics, mathematical biology, ordinary differential equations, and real analysis.

Research interests: Mathematical biology, bifurcation theory, theory of nonlinear dynamical networks, dynamics with symmetry, data science.

Languages: Portuguese (Native speaker); English (Fluent); Spanish (Fluent in Reading & Speaking); French (Basic knowledge).

AWARDS

1. Early Career Award, Mathematical Biosciences Institute (MBI), 12/2012.
 2. Student Impact Award, University of Toledo, 12/2011.
 3. Travel grants from NSF and other sources to participate in 27 professional meetings, 7/2005 to present.
 4. Best Poster Award, SIAM Conference on Applications of Dynamical Systems, 5/2005.
 5. Research Assistantship, University of Houston, Department of Mathematics, 1/2002 to 8/2005.
 6. Research Assistantship, PRODEP Supported by the Portuguese and European Education Office Program, Department of Mathematics, ISEP, Portugal, 2/2001 to 12/2001.
-

PROFESSIONAL EXPERIENCE

UNIVERSITY OF SOUTH FLORIDA ST. PETERSBURG (USFSP)

Assistant Professor, Mathematical & Statistical Unit

8/2014 to Present

LEAVE OF ABSENCE FROM USFSP

8/7/2016 to 16/5/2017

INSTITUTE FOR CROP SCIENCE AND CONSERVATION (INRES),

UNIVERSITY OF BONN; USADEL LAB GROUP, RWTH AACHEN UNIVERSITY;

AND JÜLICH RESEARCH CENTER, GERMANY

Guest Researcher

MARIA LEITE

Page 2 of 19

Fall & Spring semesters
8/2014 to 5/2016UNIVERSITY OF SOUTH FLORIDA ST PETESBURG, FL
Interim Unit Coordinator, Mathematical & StatisticsUNIVERSITY OF TOLEDO, Toledo, OH
Assistant Professor, Department of Mathematics

8/2011 to 7/2014

MATHEMATICAL BIOSCIENCES INSTITUTE, Columbus, OH
Earlier Career Visitor

8/2013 to 15/12/2013

UNIVERSITY OF OKLAHOMA, Norman, OK
Visiting Assistant Professor, Department of Mathematics

8/2008 to 8/2011

PURDUE UNIVERSITY, West Lafayette, IN
Research Assistant Professor, Department of Mathematics

8/2005 to 8/2008

UNIVERSITY OF HOUSTON, Houston, TX
Research and Teaching Assistant, Department of Mathematics

1/2002 to 7/2005

ESCOLA TECNOLÓGICA DE VALE DE CAMBRA, Vale de Cambra, Portugal
Invited Lecturer

1/1999 to 12/2001

INSTITUTO SUPERIOR DE ENGENHARIA DO PORTO (ISEP), Porto, Portugal
Lecturer, Department of Mathematics, College of Engineering

1/1998 to 12/2001

~ *Additional previous experience as **Head of Chemical & Physical Testing Labs & Quality Compliance Mgr.**, as **High School Chemistry and Mathematics Teacher**, and as **Middle School Mathematics Teacher with the Portugal School System**~*

GRANTS**Under evaluation** (Total: \$416,609; ML: \$75,272)

1. **(Refereed, Competitively Selected) Co-PI**, Sept 2017. **Centre International de Mathématiques Pures et Appliquées (CIMPA)**. Research School on “**insight from mathematical modeling into problems in conservation, ecology, and epidemiology**,” at Department of Mathematics, Cheikh Anta Diop, Dakar Senegal, Africa, May 2018. F. Agosto (Co-PI, Dept. of Ecology and Evolutionary Biology, Univ. of Kansas.), B. Chen-Charpentier (Co-PI, Dept. of Mathematics, Univ. of Texas), N. Beckman (Co-PI, Dept. of Biology & Ecology Center, Utah State Univ.), M. Lam (Co-PI, Dept of Mathematics, Cheikh Anta Diop, Dakar Senegal) **(Total: \$31,980; ML: \$6,396)**.
2. **(Refereed) Co-PI, DEB – Evolutionary Ecology NSF 17-512**: “Collaborative Research: Nested Multi-Host Single-Pathogen Coevolutionary System,” F. Agosto (PI, Dept. of Ecology and Evolutionary Biology, Univ. of Kansas), M. Orive (Co-PI, Dept. Ecology and Evolutionary Biol., Univ. of Kansas) **Total: \$416,609; ML \$68,876)**.

Granted (Total: \$199,344, ML: \$127,311)

3. **(Preliminary Proposal, Refereed, competitively Selected) Co-PI**, Jan 2017, **NSF 17-512: DEB – Biodiversity: Disc. & Analysis**: “Collaborative Research: Multi-Host Single-Pathogen Coevolutionary System,” F. Agosto (PI, Dept. of Ecology and Evolutionary Biology, Univ. of Kansas), M. Orive (Co-PI, Dept. Ecology and Evolutionary Biol., Univ. of Kansas).

MARIA LEITE

Page 3 of 19

4. **(Refereed, Competitively Selected) Co-PI**, Dec 2016. **Centre International de Mathématiques Pures et Appliquées (CIMPA): 2017 African Mathematical Schools**. School on “Mathematical Modeling for Epidemiology, Ecology and Conservation”, at Abomey-Calavi University, Bénin, Africa, August 7-19, 2017. F. Augusto (Co-PI, Dept. of Ecology and Evolutionary Biology, Univ. of Kansas.), B. Chen-Charpentier (Co-PI, Dept. of Mathematics, Univ. of Texas), O. Gaoue (Co-PI, Dept. of Botany, Univ. of Hawaii at Manoa) **(Total: \$32,509; ML: \$10,836)**.
5. **(Invited) PI**, June 2016. **University of Bonn, Germany**. Project “Prediction and Modeling of Hybrid Performance and Yield Gain in Oilseed Rape by Systems Biology” **(Total: \$35,290)**.
6. **(Competitively Selected) Co-PI**, June 4 -7, 2015. **National Institute for Mathematical and Biological Synthesis (NimBioS)**. Research Short Visit on “Maximizing harvesting profit and minimize insect outbreak disturbances in forests;” F. Augusto (Co-PI, Dept. of Mathematics, Austin Peay State Univ.), B. Chen-Charpentier (Co-PI, Dept. of Mathematics, Univ. of Texas at Arlington) **(Total: \$5,000; ML: \$1,500)**.
7. **(Refereed, Competitively Selected) Co-PI**, May 24-27, 2015. **American Institute of Mathematics (AIM)**. Financial support for the Workshop “Topics in Applied Dynamical Systems: Equivariance and Beyond;” P. Buono (Co-PI, Univ. of Ontario Inst. of Tech, Canada), M. Kupra (Co-PI, INRIA, France), Y. Luo (Co-PI, Ohio State University), and Y. Wang (Co-PI, Texas Southern University) **(Total: \$5,000; ML: \$1,250)**.
8. **(Refereed, Competitively Selected) PI**, Aug - Dec 2013. **Mathematical Biosciences Institute (MBI) Early Career Visitor**. Research visit on “Fall 2013: Ecosystem Dynamics and Management.” **(\$27,135)**.
9. **(Competitively Selected) Co-PI**, May 17-24, 2013. **NimBioS**. Research Short Visit on “Coupling fire and insect outbreak disturbances in forests;” B. Chen-Charpentier (Co-PI, Dept. of Mathematics, Univ. of Texas at Arlington) **(Total: \$2,500; ML: \$1,000)**.
10. **(Refereed, Competitively Selected) Co-PI**, Mar 2013-Feb 2015. **NimBioS**. “Working Group on non-autonomous systems and terrestrial C-cycle;” Y. Luo (PI, Dept. of Microb. & Plant Biology, Univ. of Oklahoma) **(Total: \$80,000; ML: \$30,000)**.
11. **(Invited Research Visit) PI**, July 11-14, 2012. **University of Texas at Arlington, Department of Mathematics, Texas**. “Disturbances in ecosystems,” **(Total: \$1,200)**.
12. **(Refereed, Competitively Selected) Co-PI**, February 13-15, 2012. **NIMBioS**. “Investigative Workshop on Disturbance Regimes and Climate-Carbon Feedback,” Y. Luo (Co-PI, Botany and Microbiology, University of Oklahoma) **(Total: \$40,000; ML: \$20,000)**.
13. **(Competitively Selected) Co-PI**, July 14 -24, 2009. **National Institute for Mathematical and Biological Synthesis (NimBioS)**. Research Short Visit on “Coupling within-host and between-host dynamics,” Z. Feng (Co-PI, Dept. of Mathematics and Statistics, Purdue Univ.) and J. Hernandez-Velasco (Co-PI, Instituto del Petróleo de México) **(Total: \$6,000; ML: \$1,800)**.
14. **Travel Grants from distinct sources**. 2011 – Present **(Total: \$12,358)**.

PUBLICATIONS

1. F. Andres, M. Ge, and **M.C. Leite**, Research direction on data-driven computational cooking. **In preparation**.
2. **M.C. Leite**, B. Chen-Charpentier, F. Augusto, and O. Gaoue, Mathematical modeling of the sustainability of harvesting non-timber forest products in fragmented landscape. **In preparation**.
3. A. BenTal, **M.C. Leite**, Y. Wang, A Boolean model for neuronal-respiratory system. **In preparation**.
4. B. Chen-Charpentier, **M.C. Leite**, O. Gaoue, and F. Augusto, Mathematical Modeling of Plants under

Multiple Stressors. **Submitted.**

5. **M.C. Leite**, B. Chen-Charpentier, and F. Augusto, Optimal control for forest management subject to insect infestation. **Submitted.**
6. F. Augusto, **M. Leite**, and M.E. Orive, The transmission dynamics of a within- and between-host malaria model. **Submitted.**
7. Y. Wang, K. Chilakamarri, D. Kazakos, and **M.C. Leite** (2017), Dynamics: network systems and their subnetworks, Proceeding of Nonlinear Theory and its Applications Society. Accepted.
8. **M.C. Leite**, B. Chen-Charpentier, and F. Augusto (2017) A Mathematical model of tree harvesting in age-structured forest subject to beetle infestations, *Comp. Appl. Math.*; Doi:10.1007/s40314-017-0516-z.
9. Y. Wang, K. Chilakamarri, D. Kazakos, and **M.C. Leite** (2017), Relations between the dynamics of network systems and of their subnetworks, *AIMS Mathematics*, 2(3): 437-450; doi:10.3934/Math.2017.2.437.
10. B. Chen-Charpentier and **M. Leite** (2014). A model for coupling fire and insect outbreaks in forests, *Ecological Modelling*, 286(24):26-36.
11. Y.P. Wang, B. Chen-Charpentier, W.R. Wieder, Y.Q. Luo, **M. Leite**, B.E. Medlyn, M. Rasmussen, M.J. Smith, F.B. Augusto, and F. Hoffman (2014). Oscillatory behavior of two nonlinear microbial models of soil carbon decomposition, *Biogeosciences*, 11:1817-1831, doi:10.5194/bgd-11-1817-2014.
12. **M. Leite**, N. Petrov, and E. Weng (2012). Stationary distributions of semistochastic processes with disturbances at random times and random severity, *Nonlinear Analysis: Real World Applications*, 13:497-512.
13. Z. Feng, J. Velasco-Hernandez, B. Tapia-Santos, and **M. Leite** (2012). A model for coupling within-host and between-host dynamics in an infectious disease, *Nonlinear Dyn*, doi:10.1007/s11071-011-0291-0.
14. J. Velasco-Hernandez and **M. Leite** (2011). A model for SEIR diseases with social isolation, *Salud Publica de Mexico*, 53(1):40-47.
15. **M. Leite** and Y. Wang (2010). Multistability, oscillations, and bifurcations in feedback loops, *Math. Biosci. Eng.*, 7(1) (2010):83-97.
16. M.A.D. Aguiar, A.P.S. Dias, M. Golubistky, and **M. Leite** (2009). Bifurcations from regular quotient networks: a first insight, *Physica D*, 238:137-155.
17. M.A.D. Aguiar, A.P.S. Dias, M. Golubistky, and **M. Leite** (2007). Homogeneous coupled cell networks with S3-symmetric quotient, *Discrete and Continuous Dynamical Systems*, Supplement:1-9.
18. **M. Leite** and M. Golubitsky (2006). Homogeneous three-cell networks, *Nonlinearity*, 19:2313-2363.

INVITED RESEARCH VISITS

- Institute of Photonics and Electronics, The Czech Academy of Sciences, Republic Czech (March 30-31,

2017)

Lead discussions with M. Cifra to explore the possibilities of collaboration on the interface of mathematics and ultra-weak photon emission in biological systems.

- National Institute of Informatics (NII), Tokyo, Japan (May 11 – 20, 2016)
Interacted with F. Andres to explore the design of an early warning system for insect outbreaks in forests. Shared research results in mathematical biology field with local experts.
- Mathematical Biosciences Institute (MBI), Ohio (October 25 - 28, 2012)
Lead discussions with M. Golubitsky and A. Arsie to further advance preparation of the manuscript on “Strongly Feedforward Networks: Linear Structure and Bifurcations.”
- MBI, Ohio (June 10-24, 2010)
Collaborated with Y. Wang, M. Golubitsky, and local experts to explore questions in the theory of coupled cell networks; discussions led to a two possible new projects.
- Utah State University, Department of Mathematics, Utah (August 5-11, 2009)
Shared research results in mathematical biology field to a research team and discussed ideas about how to integrate movement into ecological models.
- Instituto Nacional de Matematica Pura e Aplicada (IMPA), Rio de Janeiro, Brazil (June 1-8, 2008)
Interfaced with local experts in mathematical biology aiming to advance a project on mathematical modeling for coupling within-host and between-host dynamics of HIV.
- University of Porto, Department of Mathematics, Porto, Portugal (June - July, 2006)
Interacted with researchers A.P.S. Dias and M.A.D. Aguiar, gave presentation at departmental Dynamical Systems Seminar, and finished preparation of manuscript “Homogeneous Coupled Cell Networks with S3-symmetric Quotient” for publication. Started to develop research work that led to the paper “Bifurcations from Regular Quotient Networks: A First Insight”.

SYNERGETIC ACTIVITIES

I. Service to broader mathematical community

1. **Journal Referee.** 2007 – present, Applied Mathematics and Computation, Bulletin of Mathematical Biology, Discrete and Continuous Dynamical Systems, Journal of Biological Dynamics, Journal of Theoretical Biology, Mathematical Bioscience Engineering, Nonlinearity, Physica D, SIAM Journal on Applied Dynamical Systems, MEDES Proceedings.
2. **Book Chapter Proposal Pi.** Aug 2017-Present. Book: *IFSR Systems Science & Engineering, Springer Eds.* Chapter on “Sustainability of harvesting non-timber forest products in fragmented landscape: a mathematical.”
3. **Proposal Co-Pi & Organizer Committee Member.** June 2017-Present. **Competitively Selected Workshop** on *Data Engineering, Intelligent Food and Cooking Recipes*, 34th IEEE International

Conference on Data Engineering, Paris, France, April 2018.

4. **Research School, Proposal Co-Pi & Scientific Committee Member.** May-Sept 2017. 2018 CIMPA (Centre International De Mathématiques Pures et Appliquées) Research School on *"Insight from mathematical modeling into problems in conservation, ecology, and epidemiology"*. Submitted to CIMPA.
5. **NOLTA2017 Publication Co-Chair. July 2016 – present,** The 2017 International Symposium on Nonlinear Theory and its Applications, Cancún, Mexico, Dec 4-7, 2017.
6. **Research School, Proposal Co-Pi & Scientific Committee Member.** 2016. 2017 CIMPA-BENIN Research School on *mathematical modeling for epidemiology, ecology and conservation*. CIMPA grant.
7. **MEDES2016 Member of the Program Committee. 2016,** The 8th International Conference on Management of Digital EcoSystems, Hendaye, France, Nov 2-4, 2016.
8. **(Co-Organizer) November 2016. Modeling Workshop** on "Prediction and Modeling of Hybrid Performance and Yield Gain in Oilseed Rape by Systems Biology", Isernhagen HB, Germany.
9. **(Co-Organizer) July 2016. Minisymposium** on "Contemporary approaches in epidemiological modeling of infectious diseases," The joint meeting of the European Society for Mathematical and Theoretical Biology (ESMTB) and the annual meeting of the Society for Mathematical Biology (SMB), Nottingham, United Kingdom.
10. **(Co-Organizer) July 2016. Minisymposium** on "Population Viability of Endangered Plant Species Subject to Multiple Stressors", 2016 SIAM Conferences on the Life Sciences, Boston, Massachusetts.
11. **(Co-Organizer) June-July 2015. Minisymposium** on "Contemporary approaches in mathematical epidemiology and ecology of forest/plant diseases," 2015 Society for Mathematical Biology Annual Meeting, Georgia.
12. **(Co-Organizer) May 2015. Workshop** on "Topics in applied dynamical systems: equivariance and beyond," Ohio State University, Ohio.
13. **(Co-PI) March 2013-May 2014. Working Group** on "Non-autonomous systems and terrestrial C-cycle," National Institute for Mathematical and Biological Synthesis (NimBioS), Tennessee.
14. **(Co-Organizer) February 2012. Workshop** on "Disturbance Regimes and Climate-Carbon Feedback," NIMBioS, Tennessee.
15. **(Co-Organizer) May 2010. Minisymposium** on "Structure and Dynamics of Biochemical Reaction Networks":
 - **The 8th AIMS Conference on Dynamical Systems, Differential Equations and Applications, Germany.**
 - **Joint SIAM / RSME-SCM-SEMA Meeting Emerging Topics in Dynamical Systems and Partial Differential Equations DSPDEs10, Spain.**

16. **(Co-Organizer) August 2009. Minisymposium** on “Bridging Theory of Coupled Cell Systems and Biological Modeling”, SIAM Conference on Applications of Dynamical Systems, Utah, May 2009.
17. **(Co-Organizer) August 2008. Minisymposium** on “Networks Structure and Dynamics”, SIAM Conference on The Life Sciences, Canada.
18. **(Co-Organizer) August 2006. Minisymposium** on “Recent Advances in Mathematical Epidemiology”, Joint SIAM Conference on The Life Sciences, North Carolina.

19. Mentoring Students

- Jan. - May 2013. **University of Toledo, M.S. Math student. Project:** Epidemiological mathematical models and standard bifurcation techniques to study/interpret temporal dynamical behavior.
- Aug. - Dec. 2012. **University of Toledo, three Ph.D. Math students. Project:** Bifurcation theory and its applications to ecological sciences.
- Aug. - Dec. 2012. **University of Toledo, two undergraduate students (one Math, one Physics) and a graduate math student. Project:** Mathematical modeling in environmental / Biological Sciences: studying dynamics using dynamical systems tools and numerical simulations.
- May - Jul. 2011. **University of Oklahoma, Ph.D. Math Student. Project:** Numerical simulation with Matlab of a mathematical model to study the changes on seasonal influenza dynamical patterns with variations in climate.
- 1995 - 1997. **ADITEC, two undergraduate and three graduate Chemical Engineering Students. Project:** Mentored students completing mandated internship at ADITEC in the scope of Erasmus European Project. Instructed on original approaches to research and experimental work as well as interpretation and presentation of results.

20. Curriculum Development

- Structured, in collaboration with peer in Environmental Sciences Department, a two/three-hour/week discussion of research in the broad field of mathematical biology for Masters/PhD students from various academic disciplines including Biology, Environmental Sciences, Life Sciences, Health Sciences, Computer Science, Mathematics, and Statistics; University of Toledo, Toledo, OH, Fall2011/Fall2012.
- Designed Calculus III course in collaboration with peer aiming to develop qualified engineers for regional implementations; Escola Tecnologica de Vale de Cambra, Vale de Cambra, Portugal, December 1998.

II. Service to the department within home institutions**Leadership**

- Aug 2014 – May 2016 (Fall & Spring Semesters). Interim Mathematics & Statistics Unit Coordinator, University of South Florida St. Petersburg (USFSP).
- Jan - May 2015. Acting Mathematics & Statistics Upper Division Coordinator, USFSP.

Committee Service

1. Spring 2016. **Department of Biological Sciences 2015 Faculty Annual Review Committee member, USFSP.**
2. Spring 2016. **Instructor of Mathematics and Visiting Assistant Professor of Mathematics Search Committee member, USFSP.**
3. March-May 2015. **Instructor of Mathematics Search Committee and Visiting Assistant Professor Search Committee member, USFSP.**
4. Spring 2015. **Department of Biological Sciences 2014 Faculty Annual Review Committee member, USFSP.**
5. Aug 2013 – Aug 2014. **Graduate Student Affairs Committee member, University of Toledo.**
6. Spring 2014. **Visiting Assistant Professor of Mathematics Search Committee member, University of Toledo.**
7. Spring 2014. **Undergraduate Scholarship Day committee member, University of Toledo.**
8. Aug 2013 – May 2014. **Graduate Program Assessment Committee member, University of Toledo.**
9. Dec 2012 – Aug 2014. **Graduate Faculty member, University of Toledo.**
10. Aug 2012 – Aug 2013. **Chair, Graduate Curriculum Committee, University of Toledo.**
11. 2012. **Ph.D. Oral Examination Committee member for Manoj Lamichhane, University of Toledo.**

Ad-Hoc Committee Service

12. Aug 2014 – May 2016. **Chair, Unit Faculty Hiring Needs Assessment Committee, USFSP.**
13. Aug 2014 – May 2016. **Math & Stat Unit Assessment Committee member, USFSP.**
14. Aug 2014 – May 2016. **Student Assessment Committee member, USFSP.**
15. Aug 2014 – May 2016. **Math & Stat Unit Liaison Committee member, USFSP .**
16. Aug 2014 – May 2016. **Math & Stat Adjunct Hiring and Faculty Per-reviewed Annual Evaluations Committee member, USFSP.**
17. Aug 2014 – May 2016. **Scheduling Committee member, USFSP.**
18. Aug 2014 - May 2015. **Chair, Math & Stat Unit Webpage Design Committee, USFSP.**

Invitation of External Speakers

- **University of South Florida St. Petersburg, Fall 2015.**
Alona Ben-Tal (Mathematics, Massey University, New Zealand): Two weeks research visit and public talk.
- **University of Toledo, Department Colloquium and Applied Mathematical & Dynamical System**

Seminar:

Spring 2013: Mike Field (Rice University), Libin Rong (Oakland University);

Fall 2012: Benito Chen-Charpentier (University of Texas Arlington);

Spring 2012, Shoemaker Lecture Series: Martin Golubitsky (Mathematical Biosciences Institute - Ohio State University);

Fall 2011: Martin Golubitsky (Mathematical Biosciences Institute - Ohio State University).

GUEST LECTURES

1. October 26, 2016, **Jülich Research Center, Institute of Bio- and Geosciences Plant Sciences (IBG-2)**, Mathematical tools to study of complex systems, Jülich, Germany.
2. May 2016, **National Institute of Informatics**, Maximizing tree harvesting benefit from forests under insect infestation stressor, Tokyo, Japan.
3. May 20, 2014, **University of South Florida at St Petersburg, Mathematics and Statistics Program**, A model for coupling wildfire and insect outbreak disturbances in forests, St. Petersburg, Florida.
4. April 21, 2014, **American River College, Mathematical Program Colloquium**, A Calculus II Lecture: Centers of Mass in the Plane, Sacramento, California.
5. March 25, 2014, **Oakland University, Math & Stat Department Colloquium**, A Model for Coupling Fire and Insect Outbreaks in Forests, Rochester, Michigan.
6. March 10, 2014, **University of Toledo, Applied Mathematics / Dynamical Systems Seminar**, A Model for Coupling Fire and Insect Outbreaks in Forests, Toledo, Ohio.
7. November 19, 2013, **Mathematical Biosciences Institute, MBI Visitor Seminars**, Modeling population dynamics driven by external factors, Columbus, Ohio.
8. April 2012, **Northern Illinois University, Department of Mathematical Sciences Colloquium**, Mathematical models and oscillatory dynamics in biological systems, DeKalb, Illinois.
9. February 2012, **Utah State University, Department of Mathematics and Statistics Colloquium**, Mathematical modeling of ecosystems undergoing disturbances, Logan, Utah.
10. Spring 2012, **University of Toledo, Applied Mathematics / Dynamical Systems Seminar**, Series of two lectures on Theory of Coupled Cell Networks, Toledo, Ohio.
11. February 29, 2012, **University of Toledo, Seminar for high school teachers**, Mathematical modeling of ecosystems undergoing disturbances, Toledo, Ohio.
12. January 2012, **University of Toledo, Department of Biology Colloquium**, Mathematical models and temporal dynamics of viruses, Toledo, Ohio.
13. October 2011, **University of Toledo, Seminar for high school teachers**, Modeling seasonal dynamics of influenza under changing climate in Hong Kong and Beijing: one peak versus double peaks, Toledo, Ohio.
14. June 17, 2011, **University of Oklahoma, Department of Botany & Microbiology Seminar**, Stationary

MARIA LEITE

Page 10 of 19

distributions of semi-stochastic processes with disturbances at random times and with random severity, Norman, Oklahoma.

15. February 28, 2011, **University of Toledo, Department of Mathematics Colloquium**, Oscillatory Patterns in Cell Signal Networks and Influenza Epidemics, Toledo, Ohio.
16. February 17, 2011, **University of Texas at Arlington, Department of Mathematics Colloquium**, Oscillatory Patterns in Cell Signal Networks and Influenza Epidemics, Arlington, Texas.
17. February 7, 2011, **University of Oklahoma, Department of Mathematics Graduate Student Seminar**, SEIR Model and Patterns of Influenza Epidemics, Norman, Oklahoma.
18. August 11, 2010, **University of Oklahoma, Department of Botany & Microbiology Seminar**, Modeling H1N1 Influenza in Mexico and Study HIV Optimal Drug Treatment, Norman, Oklahoma.
19. February 1, 2010, **Clarkson University, Department of Mathematics Colloquium**, Dynamics in Regulatory Networks and HIV Disease, Potsdam, New York.
20. January 19, 2010, **University of Oklahoma, Math Day**, Toys and Carnival Rides: Interesting Nonlinear Dynamics, Norman, Oklahoma.
21. October 30, 2009, **University of Oklahoma, Student Applied Math Seminar**, Multistability and Oscillations in Feedback Loops, Norman, Oklahoma.
22. February 23, 2009, **University of Oklahoma, Graduate Student Seminar**, Infectious Diseases in Humans: HIV-1 as a Case Study, Norman, Oklahoma.
23. October 8, 2008, **University of Oklahoma, Student Applied Math Seminar**, HIV-1 Infectious Diseases: a Case Study, Norman, Oklahoma.
24. February 25, 2008, **Valdosta State University, Department of Mathematics Colloquium**, Some Interesting Dynamics in Small Networks, Valdosta, Georgia.
25. January 25, 2008, **Purdue University, Department of Mathematics Applied Seminar**, Interesting Dynamics in Small Networks, West Lafayette, Indiana.
26. January 22, 2008, **Clemson University, Department of Mathematics Colloquium**, Dynamics on Small Networks, Clemson, South Carolina.
27. June 2006, **University of Porto, CMAUP Applied Math Center, Dynamical System Seminar**, Homogeneous Three-Cell Networks, Porto, Portugal.
28. 2001, **University of Porto, Department of Mathematics Seminar**, Hopf bifurcation in a CSTR with a PI Controller, Porto, Portugal.

PRESENTATIONS/PARTICIPATIONS AT MEETINGS

1. January 2018 (**National, Invited Speaker**), *Special Session: Mathematical Modeling of Natural Resources*. Join Mathematics Meetings, San Diego, CA.
2. December 2017 (**International, Invited Speaker**), *Special Session: Dynamical Networks and Structure*. The 2017 International Symposium on Nonlinear Theory and Its Applications, Cancun, Mexico.
3. July 2017 (**National, Speaker**), 2017 SIAM Annual Meeting, *Contributed talk: Mathematical Modeling of*

MARIA LEITE

Page 11 of 19

Plants under Multiple Herbivores Stressors, Pittsburgh, PA.

4. November 2016 (**Local, Speaker, co-organizer**), Workshop on Prediction and Modeling of Hybrid Performance and Yield Gain in Oilseed Rape by Systems Biology, *Talk: Conceptual approach for computing heterosis in rapeseed*, Isernhagen HB, Germany.
5. July 2016 (**National, Speaker, Minisymposium co-organizer**), The 2016 SIAM Conferences on the Life Sciences, *Contributed talk: Maximizing Tree Harvesting Benefit from Forests Under Insect Infestation Stressor*, Boston, MA.
6. June 2015 (**National, Participant, Minisymposium co-organizer**), 2015 Society for Mathematical Biology Annual Meeting, Atlanta, GA.
7. May 2015 (**National, Co-organizer**), Workshop on “Topics in applied dynamical systems: equivariance and beyond,” Ohio State University, Columbus, OH.
8. May 2015 (**Local, Invited participant, Talk**), SOTA Research BootCamp, *Short talk: Insect outbreaks and harvesting in forests – mathematical models for coupling disturbances*, University of South Florida, Tampa, FL.
9. February 2015 (**International, Speaker**), ICMBE 2015: XIII International Conference on Mathematical Biology and Ecology, *Contributed talk: Insect Outbreaks, Harvesting, and Wildfire in Forests: Mathematical Models for Coupling Disturbances*, Rio de Janeiro, Brazil.
10. October 2014 (**National, Speaker**), 10th Conference on Differential Equations and Computational Simulations (In honor of Ratnasingham Shivaji), *Contributed talk: Modeling coupled disturbances in forests: insect outbreaks and harvesting*, Mississippi State University, Mississippi.
11. April 2014 (**National, Invited Speaker**), *Symposium: New Perspectives on Regulation, Interaction, and Noise Found in Physiological Systems*. Experimental Biology 2014 Annual Meeting, San Diego, CA.
12. March 2014 (**National, Speaker**), Working Group Second Meeting on Nonautonomous Systems and Terrestrial C-Cycle, *Contributed talk: First Kinetic Non-autonomous Homogeneous Model: Stability Analysis*, National Institute for Mathematical and Biological Synthesis, Knoxville, TN.
13. October 2013 (**Regional, Invited Speaker**), *Special Session: Mathematical Issues in Ecological and Epidemiological Modeling*. SE Section of the AMS meeting, Louisville, KY.
14. May 2013 (**National, Speaker**), Working Group First Meeting on Nonautonomous Systems and Terrestrial C-Cycle, *Contributed talk: A Mathematical Perspective on the Terrestrial Carbon Cycle*, National Institute for Mathematical and Biological Synthesis, Knoxville, TN.
15. September, 2012 (**International, Invited Speaker**), XXXII Dynamics Days Europe, *Special Session: Understanding dynamics of real networks using mathematics*, Gothenburg, Sweden.
16. August 2012 (**National, Invited Speaker**), The SIAM conference on Life Sciences, *Special Session: Long-term Dynamical Properties of biochemical Reaction Systems*, San Diego, CA.
17. July 2012 (**National, Speaker**), Annual Meeting and Conference of The Society for Mathematical Biology, *Contributed talk on the Special Session: Ecology 3*, Knoxville, TN.
18. June 2012 (**International, Invited Speaker**), International Conference on Mathematical Methods and

MARIA LEITE

Page 12 of 19

Models in Biosciences, *Contributed talk: Climate-driven dynamics of seasonal influenza in sub-tropical regions*, Bulgarian Academy of Sciences, Sofia, Bulgaria.

19. May 2012 (**National, Invited Participant**), Workshop on Progress and Problems in Dynamics, Houston, TX.
20. January 2012 (**National, Invited Speaker**), Joint Mathematics Meetings, *Special Session: Recent Advances in Mathematical Biology, Ecology, and Epidemiology*, Boston, MA.
21. January 2012 (**National, Invited Speaker**), Joint Mathematics Meetings, *Special Session: Optimal Control in Applied Mathematical Modeling*, Boston, MA.
22. January 2011 (**National, Invited Speaker**), Joint Mathematics Meetings, *Special Session: Structured Models in Ecology, Evolution, and Epidemiology: Periodicity, Extinction, and Chaos*, New Orleans, LA.
23. July 2010 (**International, Invited Speaker**), 2010 Annual Meeting of The Society of Mathematical Biology, *Contributed talk: Dynamics in Feedback Loops - Oscillations and Bifurcations*, Rio de Janeiro, Brazil.
24. October 2009 (**National, Speaker**), The Second International Conference on Mathematical Modeling and Analysis of Populations in Biological Systems, *Contributed talk: Multistability and Oscillations in Feedback Loops*, Huntsville, AL.
25. July 2009 (**International, Invited Speaker**), Annual Meeting of The Society for Mathematical Biology and International Conference on Mathematical Biology, *Special Session: Dynamics of Biochemical Reaction Networks*, Vancouver, Canada.
26. July 2009 (**International, Speaker**), First PRIMA Congress; *Contributed talk on the Special Session "Dynamical Systems"*, Sydney, Australia.
27. May 2009 (**National, Speaker**), SIAM Conference on Applications of Dynamical System, *Contributed talk: Bifurcations from Quotient Coupled Cell Systems*, Snowbird, UH.
28. December 2008 (**National, Speaker**), Conference on Differential Equations and Applications to Ecology and Epidemiology, *Contributed talk: Coupling within-host and between-host dynamics*, Purdue University, West Lafayette, IN.
29. June 2008 (**International, Invited Speaker**), AMS - SBM First Joint Meeting, *Special Session: Mathematical Methods in Biology*, Rio de Janeiro, Brazil.
30. May 2008 (**National, Invited Speaker**), 7th AIMS International Conference, *Special Session: Differential, Integral Equations, And Their Applications*, University of Texas at Arlington, TX.
31. May 2008 (**National, Invited Speaker**), 7th AIMS International Conference, *Special Session: Evolution Dynamics in Ecology and Epidemiology*, University of Texas at Arlington, TX.
32. January 2008 (**National, Speaker**), AMS Joint Mathematics Meetings, *Contributed talk: Bifurcations from Quotient Coupled Cell Systems*, San Diego, CA.
33. October 2007 (**National, Invited Speaker**), AMS Central Section Meeting, *Special Session: Networks*, DePaul University, Chicago, IL.
34. May 2007 (**National, Participant**), SIAM Conference on Applications of Dynamical System, Snowbird,

MARIA LEITE

Page 13 of 19

UH.

35. May 2007 (**National, Participant**), Applications of Analysis to Mathematical Biology, Duke University, Raleigh, NC.
36. March 2007 (**National, Participant**), Workshop on the Mathematics of Global Public Health, Arizona State University, Tempe, AZ.
37. January 2007 (**National, Invited participant, Talk**), MSRI Introductory Workshop on Dynamical Systems with Emphasis on Extended Systems, MSRI; *Short Talk: Coupling Structure of Systems of ODEs and Their Bifurcations*, Berkley, CA.
38. August 2006 (**National, Participant, Poster**), Joint SIAM Conference on the Life Sciences, *Contributed poster: Three-Identical Coupled Systems of ODEs*, Raleigh, NC.
39. June 2006 (**International, Speaker**), The 6th AIMS Conference on Dynamical Systems, Diff. Equations, and Applications, *Contributed talk: Three-Identical Coupled Systems of ODEs*, Poitiers, France.
40. January 2006 (**National, Speaker**), AMS Joint Mathematics Meetings, *Contributed talk: Networks of Three-Identical Coupled Systems*, San Antonio, TX.
41. October 2005 (**National, Participant, Poster**), Workshop on Applications of Methods of Stochastic Systems and Statistical Physics in Biology, *Contributed poster: Networks of Three-Identical Systems*, University of Notre Dame, IN.
42. September 2005 (**International, Invited Participant**), Workshop on Theory and Applications of Coupled Cell Networks, Isaac Newton Institute, United Kingdom.
43. July 2005 (**International, Invited Participant, Talk**), Connecting Women in Mathematics Across Canada II, *Contributed talk: Coupled Cell Systems*, Banff Centre, Canada.
44. May 2005 (**National, Participant, Poster**), SIAM Conference on Applications of Dynamical Systems, *Contributed Poster: Homogeneous Three-Cell Networks*, Snowbird, UH.
45. March 2005 (**National, Speaker**), 3rd Texas Dynamical Systems Workshop, *Contributed talk: Homogeneous Three-Cell Networks and Codimension-one Hopf Bifurcation*, San Antonio, TX.
46. February 2005 (**National, Invited Participant, Poster**), Coupled 60 Workshop, Houston, TX.
47. January 2005 (**International, Invited Participant, Poster**), Pan-American Advanced Studies Institute 2005 VI (School and Conference), *Contributed Poster: Homogeneous Three-Cell Networks*, Santiago, Chile.
48. July 2004 (**National, Participant, Poster**), SIAM Annual Meeting and SIAM Conference on Life Science, *Contributed poster: Synchrony-Breaking Bifurcations in Homogeneous Three-Cell Networks*, Portland, Oregon.
49. 2004 (**National, Participant**), 6th Joint Meeting of the AMS and SMM, Houston, TX.
50. March 2004 (**National, Participant**), 2nd Texas Dynamical Systems Workshop, Houston, TX.
51. May 2003 (**National, Participant**), SIAM Conference on Applications of Dynamical Systems, Snowbird, UH.
52. March 2003 (**National, Participant**), 1st Texas Dynamical Systems Workshop, Austin, Texas.

MARIA LEITE

Page 14 of 19

53. 2001 (**National, Speaker**), Scientific Meeting at Instituto Superior de Engenharia do Porto, *Contributed talk: Singularities and a Chemical Reactor*, Porto, Portugal.
54. June 2000 (**National, Participant**), School and International Conference on Dynamical System, Porto, Portugal.
55. 2000 (**National, Participant**), School on Singularities and Applications, Porto, Portugal.

TEACHING EXPERIENCEGraduate courses

1. Spring 2015. Statistical Methods I, *University of South Florida St. Petersburg* (one section, 8 students).
2. Spring 2013. Reading course on Bifurcation Theory and Applications, *University of Toledo* (one math master student).
3. Fall 2012. Mathematical Modeling in Environmental and Biological Sciences, *University of Toledo*, MATH5980 (one section, 8 students).
4. Fall 2012. Reading course on Bifurcation Theory, *University of Toledo* (3 PhD students).
5. Spring 2011. Seminar in Mathematical and Environmental Sciences, *University of Toledo*, MATH5/7980 (one section, 12 students).
6. Fall 2011. Ordinary Differential Equations, MATH6/8500, *University of Toledo* (one section, 8 students).
7. Summer 2008. Advance Mathematics for Engineers and Physicists I, MA527, *Purdue University* (one section, 15 students).
8. Spring 2008. Advance Mathematics for Engineers and Physicists II, MA528, *Purdue University* (two sections, 30 students).

Undergraduate course

1. Fall 2017. Calculus I. MAC2311, *University of South Florida St Petersburg* (one section, 30 students).
2. Spring 2016. Business Calculus, MAC2233, *University of South Florida St. Petersburg* (one section, 27 students).
3. Spring 2016. Calculus II. MAC2312, *University of South Florida St. Petersburg* (one section, 10 students).
4. Fall 2015. Calculus I, MAC2311, *University of South Florida St. Petersburg* (one section, 28 students).
5. Fall 2015. Calculus II. MAC2312, *University of South Florida St. Petersburg* (one section, 12 students).
6. Spring 2015. Calculus I, MAC2311, *University of South Florida St. Petersburg* (one section, 28 students).
7. Fall 2014. Calculus II, MAC 2312, *University of South Florida St. Petersburg* (one section, 12 students).
8. Fall 2014. Business Calculus, MAC2233, *University of South Florida St. Petersburg* (one section, 17 students).

MARIA LEITE

Page 15 of 19

9. Spring 2014. Elementary Multivariable Calculus, MATH2850, *University of Toledo* (one section, 35 students).
10. Spring 2014. Elementary Differential Equations, MATH2860, *University of Toledo* (one section, 30 students).
11. Spring 2013. Elementary Differential Equations, MATH3860, *University of Toledo* (one section, 30 students).
12. Spring 2013. Calculus II, MATH1860, *University of Toledo* (one section, 90 students).
13. Fall 2012. Mathematical Modeling in Environmental and Biological Sciences, MATH4900, *University of Toledo* (one cross-section, 3 students).
14. Fall 2012. Calculus I, MATH1850, *University of Toledo* (one section, 90 students).
15. Fall 2011. Elementary Differential Equations, MATH3860, *University of Toledo* (one section, 30 students).
16. Applied Statistics, MATH4753, *University of Oklahoma*, **Fall 2010** (two sections, 70 students).
17. Physical Mathematics I, MATH3413, *University of Oklahoma*, **Fall 2009, Spring 2009, and Spring 2011** (two sections / one section / one section).
18. Introduction to Differential Equations, MATH3113, *University of Oklahoma*, **Fall 2008 and Spring 2009** (one section / two sections).
19. Linear Algebra and Differential Equations, MA262, *Purdue University*, **Spring 2007 and Fall 2007** (two sections each semester).
20. Differential Equations and Partial Differential Equations for Engineering and the Sciences, MA303, *Purdue University*, **Fall 2006** (two sections).
21. Linear Algebra, MA265, *Purdue University*, **Spring 2006 and Fall 2005** (two sections each semester)
22. Linear Algebra, MATH2431, *University of Houston*, **Fall 2003 and Fall 2004** (Recitation and Computer Labs).
23. *Honours Calculus II*, MATH1432H, *University of Houston*, **Spring 2003** (Recitation).
24. *Honours Calculus I*, MATH1431H, *University of Houston*, **Fall 2002** (Recitation).
25. Differential Equations with MATLAB, MATH3331, *University of Houston*, **Spring 2002** (Recitation and Computer Labs).
26. Calculus III, *Escola Tecnológica de Vale de Cambra, Portugal*, **Jan 1999 to Dec 2001**, (two sections each semester).
27. Calculus I, II, and III, *ISEP, Portugal*, **Jan 1998 to Feb 2001** (three sections each semester).

Middle and High School, Portugal School System

1. Chemistry and Mathematics, Oct 1991 to Dec 1992.
2. Mathematics, Oct 1990 to Jun 1991.

ADDITIONAL TRAINING / PROFESSIONAL DEVELOPMENT**Teaching and Learning Development**

1. Registered for USFSP's 3rd Annual Bay-to-Bay Learning Symposium (1 day). February 9, 2018
2. Spring 2016 Readings:
 - a) Problem-based Learning (https://en.wikipedia.org/wiki/Problem-based_learning)
 - b) Self-Awareness Based Learning (https://en.wikipedia.org/wiki/Caleb_Gattegno)
 - c) K. Bain (2004). What the best college teachers do. Harvard University Press, Cambridge, ISBN 0-674-01325-5.
 - d) Material from 2015 Workshops: Teaching Critical Thinking and Creativity in the Classroom, ATLE at University of South Florida, Tampa, Florida.
2. June 24, 2015. Workshop on "**Teaching Critical Thinking**," ATLE at University of South Florida, Tampa, Florida.
3. July 8, 2015. Workshop on "**Creativity in the Classroom**," ATLE at University of South Florida, Tampa, Florida.

ResearchSeminar Series

1. July - November 2016. **Usadel Lab Group Meetings**, RWTH Aachen University, Institute for Biology and Molecular Genetics and Jülich Research Center, Institute of Bio- and Geosciences Plant Sciences, Germany.
2. September 2011 to May 2014. **Applied Analysis/Dynamical Systems Seminar**, University of Toledo, Department of Mathematics, Toledo, Ohio.
3. September, 2008 to May, 2011. **Analysis and Convexity Seminar**, University of Oklahoma, Department of Mathematics, Norman, Oklahoma.
4. August 25, 2008 to May 15, 2009. **Neuroscience Seminar**, University of Oklahoma, Department of Biology / Zoology, Norman, Oklahoma.
5. Fall 2005 to Spring 2007. **Seminars on Topics in Mathematical Biology**, Purdue University, Department of Mathematics, West Lafayette, Indiana.

Workshops

1. October 2016 (**National, participant**) NGS Workshop: The path from raw sequences to biological conclusions, RWTH Aachen, Institute for Biology and Molecular Genetic, Aachen, Germany.
2. January 2016 (**National, Invited participant**), MBI Workshop: Dynamics in Networks with Special Properties, Columbus, OH.
3. April 2015 (**National, Invited participant**), NIMBioS Investigative Workshop: Information and entropy in biological systems, National Institute for Mathematical and Biological Synthesis, Knoxville, TN.
4. May 2012 (**National, Invited Participant**), Workshop on Progress and Problems in Dynamics, Houston,

MARIA LEITE

Page 17 of 19

TX.

5. July 2011 (**National, Invited Participant**), NIMBioS Investigative Workshop: Mathematical Modeling of Metabolism and Body Weight Regulation, National Institute for Mathematical and Biological Synthesis, Knoxville, TN.
6. June 2011 (**National, Invited Participant**), MBI Workshop: Ocean Ecologies and Their Physical Habitats in a Changing Climate, Mathematical Bioscience Institute, Columbus, OH.
7. April 2011 (**National, Invited Participant**), NIMBioS Investigative Workshop: Synchrony in Biology Systems Across Scales, National Institute for Mathematical and Biological Synthesis, Knoxville, TN.
8. November 2009 (**National, Invited Participant**), MBI Current Topic Workshop: Mathematical Developments Arising from Biology, Mathematical Bioscience Institute, Columbus, OH.
9. December 15 to 17, 2009. **Tutorial on Optimal Control and Optimization for Biologists**, *NimBioS*, Knoxville, Tennessee.
10. June 16 to 28, 2008. **New Directions Short Course: Mathematical Neuroscience**, *Institute for Mathematics and its Applications*, Minnesota.
11. January 22 to 26, 2007. **Introductory Workshop on Dynamical Systems with Emphasis on Extended Systems**, *MSRI*, Berkley, California.

TRAVEL AWARDS*2011 – Present: \$12,358*

1. University of South Florida St. Petersburg Faculty Development Funds, 2016 (**\$500**).
2. Mathematical Biosciences Institute (MBI), Workshop: Dynamics in Networks with Special Properties, Jan 2016 (**\$400**).
3. University of South Florida at St. Petersburg Faculty Development Funds, 2015 (**\$500**).
4. Workshop: Topics on Applied Dynamical Systems: Equivariance and Beyond, Ohio State University, May 2015, May 2015 (**\$758**).
5. National Institute for Mathematical and Biological Synthesis (NimBioS), Workshop: Information and entropy in biological systems, April 2015, Knoxville, Tennessee (**\$1,200**).
6. AWM-NSF The Mathematical Travel Grant, February 2015 (**\$3,100**).
7. Experimental Biology 2014 travel Award, Experimental Biology 2014 Annual Meeting, April 26-30, 2014, San Diego, CA (**\$700**).
8. University of Toledo Faculty Development Funds, June 2013 (**\$500**).
9. AWM-NSF The Mathematical Travel Grant, June 2012 (**\$1,500**).
10. Society for Mathematical Biology (SMB) Travel Award Society for Mathematical Biology Annual Meeting and Conference, July 25-28, 2012, Knoxville, Tennessee, (**\$500**).
11. University of Toledo Faculty Development Funds Conference: BioMath 2012, June 17-23, 2012, Sofia, Bulgaria (**\$500**).
12. Workshop on Progress and Problems in Dynamics Funds, May 14 -17, 2012, Houston, Texas (**\$1,500**).

MARIA LEITE

Page 18 of 19

13. University of Toledo Provost Travel Support. Conference: Joint Mathematics Meetings, Jan 4-7, 2012, Boston, Massachusetts (**\$700**).
14. NimBioS, Workshop: Mathematical Modeling of Metabolism and Body Weight Regulation, July 12-15, 2011, Tennessee (**\$1,500**).
15. MBI, Workshop: Ocean Ecologies and Their Physical Habitats in a Changing Climate Mathematical Bioscience Institute, Jun 20-July 1, 2011, Columbus, Ohio.
16. NimBioS, Workshop: Synchrony in Biology Systems Across Scales, April 11-13, 2011, Knoxville, Tennessee.
17. SMB Travel Award, SMB 2010 Annual Meeting of the Society for Mathematical Biology, July 26–29, 2010, Rio de Janeiro, Brazil.
18. MBI, Short-term Visit, Jun 10–24, 2010, Ohio, USA.
19. The AIMS Conference Travel Fund, The 8th AIMS Conference on Dynamical Systems, Differential Equations and Applications, May 25–29, 2010, Dresden, Germany.
20. SIAM / RSME-SCM-SEMA Conference Travel Fund, The Joint SIAM / RSME-SCM-SEMA Meeting Emerging Topics in Dynamical Systems and Partial Differential Equations DSPDEs10, May 31–Jun 5, 2010, Barcelona, Spain.
21. NimBioS, Tutorial: Optimal Control and Optimization for Biologists, Dec 15–17, 2009, Tennessee.
22. MBI, Current Topic Workshop on Mathematical Developments Arising from Biology, Nov 8–10, 2009, Ohio.
23. SMB Travel Award, International Conference on Mathematical Biology and Annual Meeting of The Society for Mathematical Biology, July 27–30, 2009, Vancouver, Canada.
24. Travel funding for First PRIMA Congress, July 6–10, 2009, Sydney, Australia.
25. AWM-NSF The Mathematical Travel Grant, March 2009.
26. Institute for Mathematics and its Applications (IMA), New Directions Short Course: Mathematical Neuroscience, Jun 16–28, 2008, Minnesota.
27. The AIMS Conference Travel Fund, The 7th AIMS Conference on Dynamical Systems, Diff. Equations, and Applications, May 18-21, 2008, Texas.
28. MSRI, Introductory Workshop on Dynamical Systems with Emphasis on Extended Systems, Jan 22–26, 2007, California.
29. The AIMS Conference Travel Fund, The 6th AIMS Conference on Dynamical Systems, Diff. Equations, and Applications, Jun 25–28, 2006, Poitiers, France.
30. Isaac Newton Institute, Workshop on Theory and Applications of Coupled Cell Networks, Sept 26–30, 2005, United Kingdom.
31. AWM-NSF The Mathematical Travel Grant, March 2006.
32. AWM-NSF The Mathematical Student Travel Grant, Connecting Women in Mathematics Across Canada II, Jul 21–23, 2005, Banff Centre, Canada.

PROFESSIONAL ASSOCIATIONS

1. Institute of Electrical and Electronics Engineers (IEEE), Aug 2015 to Present
(www.ieee.org/about/index.html)
2. Full Membership of the Graduate Faculty, University of Toledo, 2012-2014 (www.smb.org)
3. Lake Erie Center Board Member, 2012-2014
4. Society for Mathematical Biology (SMB), 2008 to Present (www.smb.org)
5. American Mathematical Society (AMS), 2005 to Present (www.ams.org)
6. Association for Women in Mathematics (AWM), 2005 to Present
(<https://sites.google.com/site/awmmath/home>)
7. Society for Industrial and Applied Mathematics (SIAM), 2002 to Present (www.siam.org)

Maria Leite

Stephen R. Diasio

Email: stevdiasio@googlemail.com

Website: <http://www.stevediasio.com>

Academic Full-Time Positions

2014-Present	Faculty of College of Business, University of South Florida-St. Petersburg
2012-2014	Faculty of Business of Art & Design, Ringling College of Art & Design
2007-2012	Research Associate, GREC Research Group, ESADE Business School
2011	Visiting Researcher, Innovation & Entrep. Group, Imperial Business School*

Education

Ph.D., Management Science, ESADE Business School¹ (*cum laude*)

Research fields: Open Innovation and Innovation Management

Thesis title: Open Models of Decision Support: Towards a Framework

M.A., Decision Support Technology, ESADE Business School

Thesis title: Collaborative Fusion: Expert, Group, and Collective Intelligence in Decision-making support

Professional Communication Certificate, University of Chicago

M.B.A., International Business, Dominican University

B.S., Finance, DePaul University

Teaching Experience

2014-Present Faculty-Department of Management- University of South Florida²

- 1) Principles of Management (on campus & online)
- 2) Strategic Management Capstone (on campus & online)
- 3) Open Innovation and Management Design Thinking: MBA Course (on campus & online)
- 4) Innovation and Dali MBA Course (on campus & online)
- 5) Management Design Thinking MBA Course (on campus & online)

2012-2014 Faculty- Business of Art & Design Program- Ringling College of Art & Design

Courses:

- 1) Innovation & Creativity
- 2) Entrepreneurship
- 3) Strategic Management

¹ Ranked #1 in Wall Street Journal for MBA programs in 2008 & 2007, 8th best European Business School and 17th best Global MBA programs in the Financial Times in 2017. ESADE is AACSB, EQUIS, AMBA accredited.

² Ranked #18 Nationally in U.S. News & World Report for Best Online MBA Programs.

- 4) Multidisciplinary Design Collaboration (co-taught with Interior Design faculty)
- 5) Project Management 4.5/5
- 6) Organization and Management 4.6/5
- 7) Project Crowdfunding: 5/5 course evaluations

- 2015-Present Advisory Board Committee Member (both have \$1 million+ budget)
- 1) Center for Teaching and Learning (CITL)
 - 2) [O.P.E.N. Open Partnership Network](http://www.learnopen.org/) (<http://www.learnopen.org/>)
- 2011 Teaching Assistant- Introduction to Business Information Technology- Masters of International Management- ESADE Business School (*with Dr. Joan Rodon*)
- 2010 Lecturer- Project Management- Bachelor of Business Administration- ESEI Business School
- 2010 Lecturer- Artificial Intelligence and Innovation- Masters of Research/ PhD- UPC-UPF-UAB (*with Dr. Esteve Almirall*)
- 2010 Teaching Assistant- Management Information Systems- (2 courses, 120 students) MBA- ESADE Business School (*with Dr. Jonathan Wareham*)
- 2010 Supervising of Master's Thesis- Open Innovation in StatoiHydro- ESADE Business School (*Audrey Ménard*)
- 2009-2010 Supervising of Master's Thesis- Recommender Systems in Practice- ESADE Business School (*Maria Valero*)
- 2004 Teaching Assistant- Organizational Analysis & Design- MBA- Dominican University

Selected Achievements and Industry Based Student Projects

- Keynote Speaker with Sir Ken Robinson at the inaugural [Growth, Change, and Innovation: The Inaugural Bay-to-Bay Distance Learning Symposium](#)
- Track Chair for Open Innovation at the European Academy of Management Conference
- Master Teacher Certificate granted by Georgia State University
- Course evaluations: <http://issuu.com/sdiasio> or my website
- 10 students invited as ambassadors to the Education Without Borders Conference In Dubai, UAE base on business & project plans (2 students competed for funding) 2011 & 2013
- Implemented client based student projects with The Dali Museum, Sierra Club, Valpak, The Moorings, MOTE Marine Laboratory, Big Cat Habitat Sanctuary, FELD Entertainment (Ringling Brothers Circus), and Explora Caribe in Mexico, Valpak, The Moorings, The Dali Museum, Sierra Club and Et. Cultura.
- Funding awarded for student project with MOTE Marine Laboratory (\$8,500)
- Faculty advisor to the USFSP Management Club (Student have receive Six Sigma Certifications)

- Invitation to be the *'expert in residence'* in a teaching collaboration with Patterson Foundation, FELD Entertainment and Ringling College of Art & Design
- Mentored 9 student entrepreneurial crowdfunding projects including: fashion, costume, product, and technology design
- Improvisational training that I utilize in my courses (improv troupe workshop for students)
- Member of Graduate Development Committee, Curriculum Integration Committee (AD, GIC & BOAD), Management Club founder and sponsor and Professional Development Committee.
- Researcher on European Union projects in excess of \$1 million+ (research conducted throughout the European Union)
- Funding from local, national, and international levels and an international network from industry and the research community
- Book reviewer for SAGE Publication (Design and Management Areas)

Ph.D. Thesis Summary:

Thesis presents a framework for open models of decision support through a compendium of papers that links principles of open innovation and decision support technologies. It proposes that the use of internal and external sources of knowledge can be leveraged beyond product or service innovation, to include decision-making supported by emerging technology. The framework presents a typology of decision support models and the supporting technology understudy. Dissertation paper #1 suggests a perspective of the changing landscape for decision support technology and the advancement of new technology for open models of decision support. Dissertation paper #2 investigates the 'aggregate' typology within the open model decision support framework. I use a forecasting problem within the film industry to illustrate how prediction markets aggregate dispersed knowledge of users for greater forecasting accuracy. Dissertation paper #3 is a longitudinal study over a 10-year period that uses IBM Innovation Jams as a context for large-scale collaboration within the 'platform' typology.

Publications

SELECTED ARTICLES UNDER REVIEW & MANUSCRIPTS PREPARED

Balser, W. and Diasio, S. (2017) Defining the Open Educator and Open Administrator: Connecting Education and Openness. (in preparation for the Huffington Post)

Diasio, S. (2017) Problem-Solvers and Solution-Seeking Firms: Connecting Learning to Innovation Contests, European Academy of Management Conference, Glasgow, Scotland. (*with Proceedings*)

Diasio, S. (2017) A Techno-Social Perspective of Innovation Jams- Defining and Characterizing (under review at journal).

Diasio, S. (2016) Learning from Open Innovation Contests: Exploring Problem-Solvers and Solution-Seeking Firms, ISPIM - International Society for Professional Innovation Management, Kuala Lumpur, Malaysia. (*with Proceedings*)

Diasio, S. (2016) Not All That Jazz! Jamband as a Metaphor for Organizing New Models of Innovation, *European Management Journal*. Volume 34, Issue 2, Pages 125–134 (Impact Factor 2.4)

Diasio, S. (2016) A Techno-Social Perspective of Innovation Jams- Defining and Characterizing (*Awarded Best Paper in Innovation SIG*), European Academy of Management Conference, Paris, France. (*with Proceedings*)

Diasio, S. (2015) Evolution and Definitions of Innovation Jams, DRUID15 Conference, Rome, Italy. (*with Proceedings*)

Diasio, S. (2015) Not All That Jazz! Jamband as a Metaphor for Organizing New Models of Innovation, European Academy of Management Conference, Warsaw, Poland. (*with Proceedings*)

Diasio, S., Bakici, T. (2010) A Process View of Open Innovation, DRUID-DIME Academy Winter 2010 Conference, Aalborg (DK). (*with Proceedings*)

Diasio, S., (2010) An Intermediary's Perspective on Co-creation: Mechanisms for Knowledge Management, AMCIS 2010 Proceedings. Paper 332. Lima, Peru.

Diasio, S. Elephants Can Jam: IBM Innovation Jams from Concept to Service. *Service Design & Tourism 2013*. Sarasota, Florida. <http://www.sdt2013.org/speakers>

Diasio, S. and Agell, N. Replanting the Answer Garden: Cultivating Expertise through Decision Support Technology. *Proceedings of 12th International Conference on Enterprise Information Systems (ICEIS) 2010*. Funchal-Madeira, Portugal.

Diasio, S. and Agell, N. IBM Innovation Jams A Mechanism for Change. *Proceedings of the European Academy of Management (EURAM) 2010*. Rome, Italy. Track: ICT enabling Collaboration, Innovation and Knowledge Sharing.

Diasio, S. and Agell, N. Integrating Decision Support Systems: Expert, Group, and Collective Intelligence. *Proceedings of the International Conference in Artificial Intelligence (IC'AI 09)*, 554-560, 2009. Las Vegas, Nevada. (27% acceptance rate) Track: Methodologies and Algorithms

Diasio, S. and Agell, N. The Evolution of Expertise in Decision Support Technologies: A Challenge to Organizations. *Proceedings of the 13th Computer Supported Cooperative Work in Design Conference (CSCWD'09)*, 692-697, 2009. Santiago de Chile. Track: Practice & Experience with Collaborative Systems

Teaching Cases and Materials

Diasio, S. An Open Innovation Approach to IP Management: A Case of Phillips. *Working Paper*.

Fellowships and Awards

Robert O. Barkley Fellowship Grant (Ringling College of Art & Design) (\$2,000+ internal) 2013

European Fellowship Grant* (Ministry of Education- Spanish Government) (4,500 euros) 2010-2011

FI AGUAR Research Grant (Ministry of Education- Catalan Government) (39,000 euros)	2008-2011
ESADE Business School Research Grant (9,600 euros)	2007

Industry Collaboration, Student Projects and Course Development Details

Sustainability Projects:

Project Sustainability at Ringling College: The course project included collaboration with Ringling's Sustainability Committee to promote the discussion on campus about sustainability. Created a Strategic Sustainability Plan, implemented a Sustainability Symposium and a Sustainability Bonfire to promote awareness on campus. Can be viewed at: http://issuu.com/sdiasio/docs/sustainability_plan_updated

Project Sustainable Tourism: Collaborate with Explora Caribe in Cozumel, Mexico to develop a sustainability strategy for this tour operator. Students researched and developed a plan, strategies, iconic mascot and story to drive Explora Caribe's sustainability strategy. Collaborated with the Liberal Arts Faculty and Environmental Science Coordinator- Tim Ramage.

Deliverable can be viewed at: <http://issuu.com/sdiasio/docs/teammelecofinalresearchprez>

Video Presentation: <https://www.youtube.com/watch?v=AmFHWrOB2vI>

Project Sustainable Innovation: New course developed as a recipient of the Robert O. Barkley Fellowship Grant. I developed this course to teach about frugal innovation in the developing world. Course included an experiential learning trip to Jamaica, Mexico and Haiti.

Entrepreneurial Projects and Independent Studies:

Project Crowdfunding: Students launched crowdfunding projects to enact the entrepreneurial journey. This project was complemented with students developing a pitch video; slide deck and presentations to industry professionals to develop a viable business venture. Student projects include: new sustainable products, costume design, fashion design, art gallery event fundraising, web videos, and animated trailers.

Can be viewed at: <https://www.kickstarter.com/projects/2017110090/1743229422?token=f353dbc0>

Business Plan Competition: As part of the Education without Borders Conference in Dubai, UAE, 10 students from my classes were invited as ambassadors based on their business plans around improving global education. 2 students competed for funding and were the only art and design students to compete within this conference. Can be viewed at: <http://ewb.hct.ac.ae/>

Client Based Projects and Multidisciplinary Collaboration:

This class is designed to expose students to a client-based project in a multidisciplinary environment. Students from 5 different design majors- business of art & design, advertising design, motion design, graphic design and interior design collaborated together working with the largest live entertainment company- FELD Entertainment. FELD Entertainment operates Ringling Brothers and Barnum and Bailey's Circus, Disney on Ice, Disney Live, Monster Trucks and Marvel Universe Live.

Course Projects: with FELD Entertainment and redesigning lobbies, history wall, conference rooms, branding, and work space with a common theme and voice to humanize the new offices.

Can be viewed at: <http://wendyoliva.wix.com/wendyoliva#!feld-entertainment/c12up>

Not-for-Profit Projects: Project 1: Students collaborated in groups to apply project management and design tools to create a new visitor experience for two not-for-profit clients. Students made presentations to the governing boards of each institution and one was funded \$8,500 to be implemented. Project 2: Class developed a Smart phone/ tablet app for MOTE Marine that is to bridge the different engagement points MOTE offers.

MOTE Marine Laboratories:

Project 2 deliverable: http://issuu.com/sdiasio/docs/app_research_comparison_2

Project 2 presentation: <http://issuu.com/sdiasio/docs/moteappfinal>

Project Innovation and Creativity: Students collaborated with the Service Design + Tourism Conference www.sdt2013.com to evaluate this conference as a service using service designs tools. Students volunteered in the Service Jam an innovation event for rapid prototyping and problem solving. Project culminated in creating a service design booklet of the conference and tools learned. As part of the class, students were taught improvisational techniques to help communicate nonverbally, brainstorming techniques, listening skills and in role-playing.

Can be viewed at: http://issuu.com/sdiasio/docs/sdt_booklet_b39e398c953dcb

Finger Puppet Management TV Show: Students developed a platform to teach (and learn) management concepts by producing a TV show to be aired on our YouTube Channel. The TV show was made up of 10 episodes each covering concepts from different chapters in our management textbook. Freshman students use design tools such as: role-playing, storyboards, persona profiles and design challenges to develop their TV show. Students used social media to try and make videos go viral.

Example 1: <https://www.youtube.com/watch?v=BL9edQK2-GQ>

Example 2: <http://www.youtube.com/watch?v=wRhD4wsYYy8>

Seminars and Training

- Technology Innovation Management Doctoral Consortium 2011 (*with Andrea Prencipe, Marco Giarratana, Gautam Ahuja, Stefano Brusoni, Steven White, Ashish Arora and Ron Adner*)
- Open Innovation (*with Henry Chesbrough and Wim Vanhaverbeke*)
- Organizations, Strategy, and Knowledge (*with JC Spender and Max Boisot*)
- Theory and Knowledge (*with JC Spender and Max Boisot*)
- Thematic Analysis (*with Richard Boyatzis*)
- Organizational Theory (*with JC Spender*)

Field Research and Invited Research Periods

2011* Invited researcher with the *Innovation and Entrepreneurship Group at Imperial College-London*. Time spent expanding thesis around Innovation Technology (IVT) and the foundation

technology driving innovation jams. IvT focuses on the intensification of innovation through electronic toolkits supporting design, research, development and engineering. Members of the research group include: Dr. David Gann, Dr. Mark Dodgson, Dr. Ammon Salter, Dr. Andrew Davis, and Dr. Markus Perkmann.

2009-2010 Lead researcher on **AVANZA- IA5- Itinerary for Innovation and Competitiveness & Acceleration** is supported by the Spanish Ministry of Industry, Tourism, and Commerce. The IA5 project is an eight phase initiative to understand the open innovation landscape in Europe by defining methods, technologies, and best practices in 15 case studies. Commissioned to promote understanding of open innovation with application to SME's in Europe, IA5 will culminate with the development of an open innovation platform to help facilitate ideas, problem-solving ability, and resources between participating companies. Current companies participating include: IBM, Nokia, BBVA, Phillips, KLM Airlines, Fortis, Sense Worldwide, and others. Members of the project team included: Dr. Esteve Almirall, Dr. Jonathan Wareham, Dr. Wim Vanhaverbeke, and Tuba Bakici.

2007-2009 Researcher on **AURA Project**- the AURA project focuses on the study and development of an automatic learning system for use in problems involving qualitative information and information defined in unstructured environments. The study falls within the area of artificial intelligence and was orientated towards modeling financial and marketing problems.

Professional Work Experience

AON CORPORATION, *Chicago, Illinois*

Project Manager, Group Underwriter

July 2004 – July 2007

Background: Aon is the largest risk consultancy in the world by revenue and market capitalization. At Aon I analyzed group risk and billing issues related to group, individual and other mailings. Implemented quality initiatives that created billing efficiencies and increased tracking and controls. Promoted to *Business Project Manager* of U-Select Re-Platform with a \$1 million budget and reporting to the Vice President.

- Group Underwriting and proposal creation- evaluating group risk by determining factors within industries/ companies that may affect the cost to administer insurance coverage (1800 groups annually)
- Managing the support and billing unit (3 part-timers) \$40 million in premium invoices
- Business Project Manager for U-Select Re-platform underwriting program for U.S. & Canada- implementation and training to 500+ account executives and enrollers (7 project members)
- Act as Aon Worksite staff assistant to 60+ employees and project manager in the department. Trained as a knowledge worker of business processes, administration systems, and strategic partnering to deliver new quality initiatives department wide.
- Test Lead for U-Select Re-platform (U.S. & Canada) development, SIT, and UAT stages
- Account Manager of ADP- Totalsource partnership, while maintaining the \$4 million+ in premium and 13,000+ policies

- Leader of implementation & testing for IBM-Content Manager (transferring 1 million pages of data through the imaging process)

EAGLE MARKET MAKERS - CHICAGO BOARD OF TRADE, *Chicago, Illinois*
Out-Trade Clerk & Clearing (*U.S. Treasuries & Agriculture*)

Background: The CBOT is part of the Chicago Mercantile Exchange and is the largest commodities and futures exchange by volume and revenue in the world. Acted as an out-trade and clearing clerk for U.S. Treasuries and Agriculture trading pits, responsible for clearing of trades from independent and arbitrage traders.

Professional Education and Affiliation

2008-Present AoM, SMS, EURAM, DRUID, ECIS

VAROL O. KAYHAN

Kate Tiedemann College of Business
University of South Florida St. Petersburg
140 Seventh Avenue South, PNM 103C
St. Petersburg, FL, 33701

Work: (727) 873-4006
Fax: (727) 873-4571
Email: vkayhan@usfsp.edu

PROFESSIONAL EMPLOYMENT

2016 – Current Associate Professor
University of South Florida St. Petersburg, St. Petersburg, FL
Kate Tiedemann College of Business

2010 – 2016 Assistant Professor
University of South Florida St. Petersburg, St. Petersburg, FL
Kate Tiedemann College of Business

2006 – 2010 Graduate Assistant
University of South Florida, Tampa, FL
Muma College of Business

1999 – 2004 Business Analyst
BNP-Ak-Dresdner Bank A.Ş., Istanbul, Turkey

EDUCATION

July 2010 Ph.D. in Business Administration
University of South Florida, Tampa, FL
Major: Management Information Systems

May 2008 M.S., University of South Florida, Tampa, FL
Major: Management Information Systems

Jan. 1999 B.S., Middle East Technical University, Ankara, Turkey
Major: Mechanical Engineering

RESEARCH INTERESTS

Information privacy
Healthcare informatics
Decision-making
Knowledge management

TEACHING EXPERIENCE

Predictive Analytics
Database Design and Administration
Datawarehousing & NoSQL databases
Intro to Information Systems

TEACHING PORTFOLIO

Graduate level:

- ISM 6930 - Predictive Analytics
- ISM 6930 - Fundamentals of Data Management & Analysis (online)
- ISM 6930 - Contemporary Issues in Information Systems Management (online)

Undergraduate level:

- ISM 4930 - Business Intelligence (Predictive Analytics)
 - ISM 4212 - Database Design and Administration (face-to-face and hybrid)
 - ISM 3011 - Information Systems in Organizations (face-to-face and online)
 - ISM 4220 - Business Data Communications
 - ISM 3113 - Systems Analysis & Design
-

REFEREED JOURNAL ARTICLES

Kayhan, V.O., Davis, C.J., (2016) "Situational Privacy Concerns and Antecedent Factors", *Journal of Computer Information Systems*, (56:3).

Kayhan, V.O., (2015). "The Nature, Dimensionality, and Effects of Perceptions of Community-Governance", *Information & Management*, (52:1), pp.18-29.

Kayhan, V.O., Bhattacharjee, A. (2014). "Salience of Governance Mechanisms in Contributing to Electronic Repositories." *The DATA BASE for Advances in Information Systems*, (45:2), pp.32-44.

Kayhan, V.O. (2013). "Seeking Health Information on the Web: Positive Hypothesis Testing." *International Journal of Medical Informatics*, (82:4), pp.268-275.

Kayhan, V.O., Davis, C.J., Collins, R.W., Bhattacharjee, A. (2013). "Verification of Knowledge Assets in Electronic Repositories: Expert- And Community-Governance." *Information Systems Management*, (30:2), pp.168-178.

Kayhan, V.O., and Bhattacharjee, A. (2013). "Content Use from Websites: Effects of Governance Mechanisms." *Journal of Computer Information Systems*, (53:4), pp. 68-80.

Kayhan, V.O., McCart, J.A., Bhattacharjee, A. (2010). "Cross-Bidding in Simultaneous Online Auctions: Antecedents and Consequences." *Information & Management*, (47), pp. 325-332.

Kayhan, V.O., McCart, J.A., Bhattacharjee, A., (2009). "An Empirical Study of Cross-Listing in Online Auctions." *Journal of Computer Information Systems*, (49:3), pp.76-80.

McCart, J.A., Kayhan, V.O., Bhattacharjee, A. (2009). "Cross-Bidding in Simultaneous Online Auctions: Bidder Characteristics and Outcomes." *Communications of the ACM*, (52:5), pp.131-134.

Hikmet, N., Bhattacharjee, A., Menachemi, N., Kayhan, V.O., and Brooks, R. G. (2008). "The Role of Organizational Factors in the Adoption of Healthcare Information Technologies in Hospitals." *Health Care Management Science*, (11:1), pp. 1-9.

Bhattacharjee, A., Hikmet, N., Menachemi, N., Kayhan, V.O., and Brooks, R. G. (2007). The Differential Performance Effects of Healthcare Information Technology Adoption." *Information Systems Management*, (24:1), pp.7-16.

REFEREED CONFERENCE PAPERS

Kayhan, V., Watkins, A., Kazanski, Z., Padmanabhan, B. (2016) "Predicting the Winner of a NBA Game in Real-Time: A Data Snapshot Approach." *Workshop on Information Technology and Systems (WITS)*. Dublin, Ireland. (Prototype submission, **Received the best prototype award**).

French, K. A., Allen, T. D., Chen, Z., Kayhan, V. O., & Salomon, K. (2016). "Understanding couple negotiations using sociometric badges." *The 31st Annual Conference of the Society for Industrial and Organizational Psychology (SIOP)*. Anaheim, CA.

Kayhan, V.O., (2015). "Confirmation Bias: Roles of Search Engines and Search Contexts." *International Conference on Information Systems (ICIS)*, Fort Worth, TX.

Kayhan, V.O., Chen, Z. (2013). "The Effects of Attribution Style and Helplessness on the Adoption of a Privacy Protective Response." *the Annual Meeting of the Academy of Management*, Orlando, FL.

Kayhan, V.O. (2012). "Perceptions of Community-Governance: Development of a Measurement Instrument." *Decision Sciences Institute*, San Francisco, CA.

Kayhan, V.O., and Bhattacharjee, A. (2011). "Decision-Making Under Uncertain Online Information: The Role of Web Governance." *International Association for Development of the Information Society*, Rio de Janeiro, Brazil. (**Received the best paper award**. Acceptance rate=20%)

Kayhan, V.O., and Bhattacharjee, A. (2010). "Usage of Online Knowledge Repositories: A Comparison of Two Governance Mechanisms." *Proceedings of the 18th European Conference on Information Systems*, Pretoria, South Africa.

Kayhan, V.O., Hikmet, N., and Bhattacharjee, A. (2009). "Managing Healthcare Knowledge: The Role of Governance." *Decision Sciences Institute (DSI)*, New Orleans, LA. (**Received the distinguished paper award**).

Kayhan, V.O., and Bhattacharjee, A. (2009). "Improving the Quality of Knowledge Assets: Governance of Knowledge Repositories." *Americas Conference on Information Systems (AMCIS)*, San Francisco, CA.

Kayhan, V.O., and Bhattacharjee, A. (2009). "Knowledge Reuse in Organizations: The Role of Governance Mechanisms." *Americas Conference on Information Systems (AMCIS)*, San Francisco, CA.

Kayhan, V.O., and Bhattacharjee, A. (2009). "Contributing Knowledge to Organizational Repositories: The Role of Governance Mechanisms." *Americas Conference on Information Systems (AMCIS)*, San Francisco, CA.

Bhattacharjee, A., Davis, C. J., Hikmet, N. and Kayhan, V.O. (2008). "User Reactions to Information Technology: Evidence from the Healthcare Sector." *International Conference on Information Systems (ICIS)*, Paris, France.

Chari, K., Agrawal, M. and Kayhan, V.O. (2008). "Assessing and managing information security risk: An experimental investigation and analytical model." *Workshop on Secure Knowledge Management (SKM)*, Dallas, TX.

Chari, K., Agrawal, M. and Kayhan, V.O. (2008). "An Integrated Model of Information Security & Risk Management." *Conference on Information Systems & Technology (CIST)*, Washington, D.C.

Decker, D., Kayhan, V.O., and Hikmet, N. (2007). "The societal and academic implications of electronic games use." *Northeast Decision Sciences Institute Conference*, Baltimore, Maryland.

Hikmet, N., and Kayhan, V.O. (2006). "An implementation of business process reengineering: Improving healthcare planning during emergency relief operations." *Northeast Decision Sciences Institute Conference*, San Juan, Puerto Rico.

SERVICE

To the University:

- Annual Review Committee (college-level), member, Spring 2016.
- Director for Program of Accountancy Search Committee (college-level), member, Spring 2016.
- Dean of Library Search Committee (university-level), member, Fall 5015/Spring 2016.
- Entrepreneurship Faculty Search Committee (college-level), member, Spring 2015.
- Faculty Development Committee (college-level), member, 2011-Fall 2015.
- College of Business Website Committee (college-level), member, 2013-Fall 2014.
- Entrepreneurship Faculty Search Committee (college-level), member, Spring and Summer 2013.
- College of Business Council (college-level), member, 2010-2011.
- Information Systems Faculty Search Committee (college-level), member, Spring 2011.

To the Profession:

- Decision Sciences Institute (DSI) conference, 2014, Tampa; Associate Program Chair for Local Arrangement and Activities.
- Ad-hoc reviewer for:
 - Information & Management
 - Information Systems Research (ISR)
 - Journal of Management Information Systems (JMIS)
 - European Journal of Information Systems (EJIS)
 - International Journal of Electronic Commerce (IJEC)
 - Advances in Health Care Management
 - ICIS 2009, 2011, 2012, 2014
 - AMCIS 2009

TEXTBOOK

- **SAS Enterprise Miner Exercise and Assignment Handbook for Higher Education** (self-published e-book through Amazon, available at: <http://www.amazon.com/Enterprise-Exercise-Assignment-Handbook-Education-ebook/dp/B01AVJDEUW/>).

RESEARCH GRANTS

- Principal Investigator for the University of South Florida St. Petersburg Internal Research Award for \$6,300 (for academic year 2016-2017)
 - Co-principal Investigator for the University of South Florida St. Petersburg Internal Research Award for \$10,000 (for academic year 2015-2016)
 - Principal Investigator for the University of South Florida St. Petersburg Internal Research Award for \$10,000 (for academic year 2014-2015)
 - Principal Investigator for the University of South Florida St. Petersburg Internal Research Award for \$8,000 (for academic year 2012-2013)
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HONORS & AWARDS

- The Chancellor's Award for Teaching Excellence (university-level), University of South Florida St. Petersburg (for academic year 2011-2012)
 - College of Business' Award for Teaching Excellence (college-level), University of South Florida St. Petersburg (for academic year 2011-2012)
 - Quality Matters Certification for ISM 3011 online course (November 2012)
 - Best paper award at the International Association for Development of the Information Society Conference, Rio de Janeiro, Brazil, 2011
 - Distinguished paper award at the Decision Sciences Institute Conference, New Orleans, LA, 2009
 - College of Business, Research and Scholarship Award, University of South Florida (for academic year 2009-2010)
 - Research Excellence Award, University of South Florida (2009)
 - Doctoral Consortium, AMCIS 2009, San Francisco
 - Graduate Fellowship, University of South Florida (for academic year 2006-2007)
-

OTHER RESEARCH PROJECTS

- Supervised a graduate student to conduct predictive analytics for a national company in coupon business (Spring 2015)
 - Supervised undergraduate students to design the databases of two non-profits in education (Spring 2011)
 - Conducted predictive analytics on patient notes to predict fall-related patient visits (Summer 2010)
-

PROFESSIONAL CERTIFICATIONS

- AWS Certified Solutions Architect - Associate
-

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Academic Background

Ph.D. University of Georgia, Business Administration, 1996
M.B.A. University of Georgia, Business Administration, 1989

Professional & Research Interests

Research Interests: Retail strategy; marketing strategy; electronic commerce flow experience; application of emerging technologies to business problems.
Teaching Interests: Professional selling; principles of marketing (online and mass section); internet marketing; healthcare marketing; international marketing; technology transfer; IMC/promotions management; strong interest in bringing technology to the classroom.

Work Experience

Academic

Associate Professor, Kate Tiedemann College of Business, USFSP (2006 - Present), St. Petersburg, Florida.
Assistant Professor, University of South Florida, College of Business (2001 - 2006), St. Petersburg, Florida.
Assistant Professor, University of Central Florida (1996 - 2001), Orlando, Florida.
Visiting Assistant Professor, University of Central Florida (1994 - 1996), Orlando, Florida.
Instructor, University of Georgia (1991 - 1994), Athens, Georgia.

TEACHING

Courses Taught

Courses from the Teaching Schedule: International Marketing (MAR6158), Healthcare Marketing (MAR4712), Professional Selling (MAR3400), Basic Marketing (MAR3023), ST: Marketing Internship (MAR4933)

INTELLECTUAL CONTRIBUTIONS

Refereed Articles

Basic or Discovery Scholarship

Trocchia, P. J., Saine, R., & Lockett, M. (2015). I've wanted a BMW since I was a kid: An exploratory analysis of the aspirational brand. *Journal of Applied Business Research*, 31 (1), 331-344.

Noel, N. & Lockett, M. G. (2014). The benefits, satisfaction, and perceived value of small business membership in a chamber of commerce. *International Journal of Nonprofit and Voluntary Sector Marketing*, 19 (1), 27-39.

Trocchia, P. & Lockett, M. G. (2013). Transitory bias as a source of customer dissatisfaction: An exploratory investigation. *Journal of Consumer Behavior*, 12 (1), 32-41.

Jaishankar Ganesh, Kristy E. Reynolds, Michael Lockett, and Nadia Pomirleanu (2010) "Online shopper motivations, e-store attributes, and product knowledge: An examination of online patronage behavior and shopper typologies," *Journal of Retailing*, Volume 86, Number 1, 106-115.

Karin Braunsberger, R. Brian Buckler and Michael Lockett (2008), "Dimensions of total knowledge: Do product experience and vicarious knowledge count?," *Journal of Services Marketing*, Volume 22, Number 7, 505-519.

Jaishankar Ganesh, Kristy Reynolds and Michael Lockett (2007). "Retail patronage behavior and shopper typologies: A replication and extension using a multi-format, multi-method approach," *The Journal of the Academy of Marketing Science*. Volume 35, Number 3 (September), 369-381.

Samar Das, Raj Echambadi, Michael McCardle and Michael Lockett (2003). "The effects of personality traits on shopping, information seeking and surfing on the web," *Marketing Letters*. Volume 14, Number 3 (October), 185-202.

Reynolds, Kristy E., Jaishankar Ganesh and Michael Lockett (2002), "Traditional malls versus factory outlets: A comparison of shopper typologies," *Journal of Business Research*, Volume 55, Issue 9 (Sept.), 687-696.

Allen, Jeff, Donald Fuller and Michael Luckett (1998), "Academic integrity: behaviors, rates and attitudes of business students toward cheating," *Journal of Marketing Education*, Volume 20, Number 1 (May), 41-52.

Stafford, Marla, Gopala Ganesh and Michael Luckett (1996), "Relative spousal influence in the service decision-making process: A cross-cultural investigation," *Journal of Applied Business Research*, Volume 12, Number 4 (Fall), 53-69.

Ainscough, Thomas L. and Michael Luckett (1996), "The internet for the rest of us: Marketing on the world wide web" (1996), *Journal of Consumer Marketing*, Volume 13, Number 2 (March), pp. 36-45.

Teaching and Learning Scholarship

Trocchia, P., Noel, N., Luckett, M. & Marlin, D. (forthcoming 2016). "Your final is interfering with my travel plans: Creating student entitlement clusters," European Marketing Academy, Oslo, Norway, (May).

Noel, N., Trocchia, P. J., & Luckett, M. (2015). The impact of a business education on fiscal conservatism. *Journal of Education for Business*, 90 (6), 306-313.

Refereed Proceedings

Basic or Discovery Scholarship

Noel, N., Trocchia, P., & Luckett, M. G. (2014). Gender and personality characteristics of accounting, marketing and psychology majors. *Society for Marketing Advances Conferences*.

Saine, R., Trocchia, P., & Luckett, M. G. (2014). Do you aspire to own a Rolex? An exploratory analysis on the luxury/aspirational brand. *Society for Consumer Psychology Annual Conference*.

Saine, R., Trocchia, P., & Luckett, M. G. (2014). The aspirational brand: An exploratory analysis. *American Marketing Association Winter Consumer Educators' Conference*.

Saine, R., Trocchia, P., & Luckett, M. G. (2013). Consumer perceptions regarding luxury and aspirational brands: A cross-generational investigation. *Society for Marketing Advances Conferences*.

Luckett, M. G. & Trocchia, P. (2012). An examination of collegiate student entitlement and normative implications. *American Society of Business and Behavioral Sciences*.

Luckett, M. G. & Trocchia, P. (2011). Transitory bias in service encounters: An exploratory investigation. *American Society of Business and Behavioral Sciences*.

Presentations of Refereed Papers

International

Trocchia, P., Noel, N. Luckett, M. & Marlin, D. (2015). Your Final is interfering with My Travel Plans: Creating Student Entitlement Clusters, European Marketing Association Conference, Oslo, Norway.

National

Luckett, M. G. & Trocchia, P. (2011-2012, November). *Transitory bias in service encounters: An exploratory investigation*. American Society of Business and Behavioral Sciences, Las Vegas, Nevada.

SERVICE

Service to the Institution

College Assignments

Chair:

2014-2015: COB College of Business Council (CBC)

Member:

2013-2014 – 2014-2015: COB Tenure and Promotion

2013-2014 – 2014-2015: COB Discipline/Area Coordinator

2012-2013 – 2014-2015: COB Undergraduate Curriculum and Assessment Committee

University Assignments

Chair:

2012-2013 – 2014-2015: USFSP Building Design Committee

Honors/Awards

2013-2014: Winner - Best Paper, Product and Brand Management Track, Society for Marketing Advances Annual Conference, Hilton Head, SC. "Consumer Perceptions Regarding Luxury and Aspirational Brands: A Cross-Generational Investigation." Hilton Head, SC, October 2013.

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Immigration Status: US Citizen

Education

PhD, Cognitive Science, University of Edinburgh, UK, 1985
MA, Philosophy, University of Nijmegen¹, the Netherlands, 1981
BS, Psychology, University of Nijmegen, the Netherlands, 1981

Selected Professional Development:

University System of Georgia	Executive Leadership Institute, 2009
PEGA Systems:	Certified Pega System Architect, 2015
	PEGA Instructor Certificate, 2016
	Certified Pega Business Architect, 2016
Quality Matters, Inc.:	Independently Applying the QM Rubric (APPQMR), 2015
	Independently Improving Your Online Course (IYOC), 2015

¹ Nijmegen University is now known as "Radboud University"

Employment History

- 2015 March – Present: University of South Florida St. Petersburg
Professor of Information Systems
- 2014 July – 2015 Feb: University of South Florida St. Petersburg
Regional Vice-Chancellor for Academic Affairs
and Professor of Information Systems
- 2007 Aug – 2014 July: Southern Polytechnic State University²
Dean, School of Computing and Software Engineering
and Professor of Information Technology
- 2001 Aug – 2007 July: Georgia Southern University
Professor of Information Technology
Acting Department Chair,
Department of Information Technology, July 2003 to June 2005
Associate Dean, College of Information Technology, October 2005 to July 2007
- 1992 June – 2001 July: University of the West Indies, Mona, Kingston, Jamaica
Professor of Computer Science
Chair, Department of Mathematics and Computer Science,
Aug 1992 to Aug 1999
- 1987 June – 1992 May: University of Nottingham, England
Assistant Professor, Department of Psychology
- 1984 June – 1987 May: University of Edinburgh, Scotland
Research Fellow, Department of Artificial Intelligence

² In January 2014, Southern Polytechnic State University merged with Kennesaw State University, and therefore no long exists as an independent institution.

Selected Accomplishments in Academic Administration

University of South Florida St Petersburg

The University of South Florida St Petersburg is a semi-independent institution within the University of South Florida System, located in the center of St Petersburg. It enrolls around 4,500 students, primarily at the undergraduate level. Around 20% of the students live on campus.

- As Professor of Information Systems in the Kate Tiedemann College of Business (KTCOB),
 - chair the KTCOB Strategic Planning Task Force;
 - am a member of the KTCOB undergraduate curriculum committee;
 - am a member of the senate committee on distance education;
 - am a member of the University of South Florida System committee on supplier diversity.
- As Regional Vice Chancellor for Academic Affairs (chief academic officer), I oversaw both academic affairs and student affairs. My main achievements included
 - Initiating discussion on an academic plan, to complement the institution's strategic plan, which has been approved in the fall of 2014;
 - Filling several positions that had been vacant, including a director for institutional research and a unit research administrator;
 - Directly and financially supporting a faculty member to help him obtain a \$3M NIH grant;
 - Overseeing a project to increase success rate in gateway mathematics courses. The project implemented a test-early-and-test-often strategy that allowed students to access additional material to help them recover early. Preliminary results indicate that success rates have improved both in the gateway courses and mathematics courses that have the gateway courses as prerequisites.
 - Developing, in collaboration with the Dean of the College of Arts and Sciences and the chairs in the College, a compensation policy for chairs that addresses both the concerns expressed by the chairs and the financial situation facing the university³;
 - Developing, in collaboration with the dean and faculty from the College of Arts and Sciences and with representatives from the craft brewing industry in the Tampa Bay area and the surrounding region, a professional development certificate in brewing science, the first professional development certificate program at the University of South Florida, St. Petersburg (USFSP);
 - Encouraging and supporting the establishment of additional living-learning communities;
 - Significantly improving the transparency of the operations with the Division of Academic Affairs at USFSP through the publication of a blog to celebrate the success of the faculty, students and staff at USFSP, and the wide dissemination of minutes of various meetings;
 - Attempting to establish a more data-driven culture within USFSP and the University of South Florida System.

³ The College of Arts and Sciences is the only college at the University of South Florida St. Petersburg with a departmental structure.

Southern Polytechnic State University

Southern Polytechnic State University was a member institution of the University System of Georgia, located on Marietta, GA. It had a state-wide mission to offer graduate and undergraduate programs on all aspects of technology. It enrolled around 6,000 students. In 2014, it merged with Kennesaw State University.

As Dean of the School of Computing and Software Engineering, I

- Led faculty in the development and implementation of a strategic plan for the School of Computing and Software Engineering (CSE). The plan was completed early in 2008 and, following a revision of the SPSU strategic plan, revised in spring of 2011. Working in the context of the strategic plan, faculty and staff recorded the following achievements:
 - Further implementation of a continuous improvement program for degree programs offered in the School. This resulted in
 - Re-accreditation of the BS degrees in Computer Science and Information Technology by the Computing Accreditation Commission of ABET (ABET CAC) in August 2012. Initial accreditation of the BS in Computer Game Design and Development by ABET CAC and of the BS in Software Engineering by the Engineering Accreditation Commission of ABET in August 2012.
 - Significant revisions of existing degree programs, most notably
 - MS in Information Technology (Revised program started in fall 2008)
 - MS in Software Engineering (Revised program started in fall 2009)
 - Establishment of new programs
 - Bachelor of Science in Computer Game Design and Development (Program started in fall 2009)
 - Bachelor of Applied Science in Information Technology
The program allowed students who had completed an Associate of Applied Science degree in a computing related area from a regionally accredited technical college, to transfer the equivalent of 60 credit hours to SPSU. At the inception of the program the technical college system was on a quarter system while SPSU was on a semester system, and the normal course-by-course articulation was therefore inappropriate. We therefore devised an articulation agreement based on a close inspection of the course learning outcomes of courses taken at a technical college and SPSU courses. Students were therefore given credit for a technical block of 39 credit hours with the remaining 21 credit hours being awarded on the basis of a more traditional course-by-course articulation. Program started fall 2009.
 - A range of programs in health information technology
Programs included undergraduate and graduate certificate programs, and an accelerated program for IT professionals who wish to start a career in health information technology, offered through the SPSU Center for Continuing Education
 - Made an increasing number of programs accessible to students who could not, or did not wish to, physically attend campus.
The list of programs included:
 - Bachelor of Applied Science in Information Technology
 - Master of Science in Information Technology
 - Master of Science in Software EngineeringIn addition, all but one of the leveling/transition courses for the Master of Science in Computer Science were made available both face-to-face and online. The online version of the MS in Information Technology was ranked #8 in the nation by US News and World

- Report. In all cases, students could complete a course face-to-face or fully online
- Significant improvement in facilities available to students
 - Included are a new computer gaming lab and a CSE Data Center, a \$1.3M dollar facility which allowed us to create a private cloud to support our degree programs. In addition, working with the CIO and VP for Information Systems, we established a mock IT company, Stinger IT, which is completely run by students and supports a separate IT infrastructure, the Academic Research Network, to support teaching and research, and allowing our students to gain hands-on experience with all aspects of IT service delivery, including virtualization and cloud computing.
 - Significant increases in enrollment.
 - Enrollment doubled in real terms from just under 740 majors in computing in fall of 2007 to just under 1,700 in the fall of 2013. The percentage of majors also increased as a percentage of total enrollments at SPSU from 17.1% to over 25% in the fall of 2013. The increased in majors also allowed us to have a net increase in the number of faculty of 14. To date, all new faculty hires who have come up for tenure have been awarded tenure.
 - Initiated several projects to improve retention and graduation rates
 - Initiatives included a mandatory advising policy for majors in the school and close monitoring of success rates in various courses.
 - Formulation of a series of faculty related policies, including
 - A set of clearly defined performance evaluation criteria
 - A workload policy that rewards faculty for teaching high enrollment courses
 - A policy on recovered indirect costs that rewards faculty for attracting external funding
 - Significant increases in external funding for CSE, both through increased donations to our foundation account, including a \$100,000 challenge grant for our endowment, external grants obtained by faculty, and through a major gift of a Hospital Information System by CPSI (valued at approximately \$900,000). Total external funds since 2007 total around \$5M.
 - In cooperation with SPSU's office of Advancement, establishment of the Dean's Development Council. The Council has two major functions, namely
 - Advising the Dean on the CSE strategic plan
 - Establishing an endowment for CSE
 - Improved communication with various constituencies through
 - Major redesign of the school web site
 - Publication of a monthly newsletter, which is now sent out to more than 1,500 interested individuals.
 - Led and/or oversaw the creation and maintenance of several articulation agreements between CSE and universities in Cameroon, China, Germany, Ghana and Peru.
 - Working with the Vice-President for Academic Affairs, developed a model to show the financial viability of the establishment of a separate eCampus at SPSU, similar to for example Penn State's Global Campus. The model shows that the eCampus would enable SPSU to improve the quality of student services it provides to its online students while at the same generating a significant profit for SPSU even with modest improvements in online enrollments.
 - Served on several university committees, including
 - Academic Leadership Council
 - Deans Council
 - Graduate Program Committee
 - Institutional Effectiveness and Strategic Planning Council
 - Undergraduate Curriculum Committee

- University Information Technology Advisory Committee
- Web Committee
- Chaired the WebBSIT Governing Board. The WebBSIT is a fully online bachelor of science in Information Technology, offered through a consortium of six institutions within the University System of Georgia. The Governing Board, which consists of the relevant deans of the participating institutions, acts as a board of directors and sets direction for the program.

Georgia Southern University

Georgia Southern University is a regional comprehensive institution within the University System of Georgia, located in Statesboro, GA. While enrollment has grown significantly since, during my tenure the institution enrolled around 16,000 students, around 25% of whom lived on campus

As a faculty member in the Department of Information Technology, and later as its interim chair and as associate dean of the College of Information Technology, I

- Led faculty in a successful attempt to obtain accreditation for the BS in Information Technology from the Computing Accreditation Commission of ABET. This involved the design and implementation of an assessment and continuous improvement process. This process has since been implemented at several other institutions.
- Helped develop the BS in Information Technology.
 - One of the most noteworthy features of the BS IT is that students were required to a second discipline, a coherent course of study consisting of 21 credit hours in a specific area outside computing, to help develop sufficient knowledge of a domain area to enable them to support and develop IT applications for that area. Second disciplines were included at the explicit request of potential employers who were consulted when the program was first designed.
- Helped develop the WebBSIT, as well as several the courses that make up the WebBSIT.
- Member of the College of Information Technology transition team that helped establish the new College of Information Technology at Georgia Southern University.

University of the West Indies, Mona, Kingston

The University of the West Indies, Mona, Kingston is one of three independent institutions within the University of the West Indies. It offers a full range of programs, including PhD programs. During my tenure, it enrolled around 7,000 students, most whom lived on campus.

- Department of Mathematics and Computer Science
 - Led the department in formulating a set of program outcomes for the BS in Computer Science and significantly revising the undergraduate curriculum to reflect the program outcomes.
 - Increased number of majors in Computer Science from 150 to approximately 300.
 - Led the department in establishing an MS in Computer Science
 - Working with the Chair of the Department of Management Studies, designed and co-directed a MS in Computer-Based Management Information Systems. The program was aimed at students with at least two years of relevant work experience and intended to prepare them for IT middle management positions in the English-speaking Caribbean.
 - Chaired the Organizing Committee, 1st, 2nd, 3rd, and 4th Research Conference, Faculty of Pure and Applied Sciences, 1994-1999
- Caribbean Examinations Council 1994-2001
 - Convener, Caribbean Advanced Proficiency Examinations Computer Science Panel, led a panel of Caribbean experts in designing a Caribbean wide high school syllabus in Computer Science, 1999-

2001.

- Convener, Caribbean Advanced Proficiency Examinations Information Technology Panel, led a panel of Caribbean experts in designing a high school syllabus in Information/Computer Literacy, 1996-2001.
- The University Council of Jamaica, 1997-2001
 - Chair, Information Technology Board of Studies, 1997-2001, led a panel of Jamaica-based IT professionals and university educators in developing accreditation standards for Associate and Baccalaureate degrees in Computer Science.
- Government of Jamaica
 - Convener, National Informatics Committee, Jamaica, 1996-1999. The committee advised the Government of Jamaica on IT related issues. It was to a large extent responsible for making Jamaica aware of the Y2K issue.
 - Member, National Commission on Science and Technology, Jamaica, 1994-2001. The Commission advised the Government of Jamaica on Science and Technology Related Issues.

Selected External Service

- Empire State College, New York, 2014 December - now
 - Member, Advisory Board, Competency Based IT Program
The committee advises ESC on the competency based program in Information Technology that the institution is developing.
- Georgia Regional Extension Center at Morehouse School of Medicine
 - Member, Advisory Committee, 2012 January – 2014 July
- Computing Accreditation Commission of ABET
 - Commissioner, 2009 August – 2014 July
 - Member, CAC/CSAB Criteria Committee, 2003 April – 2014 July
The Committee is charged with formulating accreditation criteria for programs in computing.
 - Program Evaluator for programs in Computing, Computer Science, Information Systems and Information Technology, 2004 July to date
 - Member, Ad Hoc Task Force to revise ABET CAC criteria and ABET policies and procedures to allow accreditation of online programs, 2007 November – 2008 April
- Special Interest Group on IT Education of the Association of Computing Machinery
 - Chair, 2005-2009
 - Member Writing Subcommittee for IT model curriculum, 2003 July – 2008 August.
Participated in a project to create a model curriculum for IT. A first draft was published in April 2005.
 - Chair - Subcommittee on Accreditation, 2002 April– 2004 August.
Led a group of academics from IT programs from universities nation-wide in formulating accreditation criteria for undergraduate programs in Information Technology. The draft IT accreditation criteria were approved on first reading by ABET's Board of Directors in the fall of 2004.
- University of the West Indies, Mona, Kingston
 - Served as a committee member of 7 students enrolled in a PhD program in Information Systems.
 - Working with representatives from the London School of Economics, the University of Alabama, the University of Florida, the University of Texas at Dallas, made recommendations for the revision of a Master of Science program in Computer-Based Management Information Systems, and a PhD program in Information Systems.
- Cobb Education Consortium
 - Member Leadership Academy II. For details, see <http://www.cobb-ed-consortium.org/>. The Academy brings together representatives from all levels of the public education system in Cobb country in an effort to improve the quality of public education for the benefits of students at all levels. I am currently working with a group of other participants on a project to determine the primary reasons that Latino students, who are well represented in primary and secondary educational institutions, do not advance into tertiary education.

Externally Funded Grants

- Several small grants to support student service learning projects, including, among others, grants from Eagle Hospital Physicians, Atlanta, to develop an interface for tele-hospitalists, and from the Multiple Sclerosis Center of Atlanta to redesign the Center's web site.
- "Morris Technology Project", Morris Technology, Savannah, 2005, ongoing at Georgia Southern University, \$6,500 per month. The primary objective of the program is to develop software that makes it straightforward for small community newspapers to establish a web presence without the need for web developers.
- "Improving irrigation efficiency through remote sensing technology and precision agriculture in SE Georgia", USDA, 2003, a 3-year project with a value of \$990,000 (with Donna Fisher and Ben Thompson, both from the College of Business Administration, Georgia Southern University)
- "Development of an IT Model Curriculum" from ACM SIG Board, 2004, \$20,000 (with representatives from Brigham Young University, Pennsylvania College of Technology, Purdue University Calumet, Rochester Institute of Technology)
- "A software development training program for Jamaica", Association Liaison Office for University Cooperation in Development, 2000/01, 2-year grant valued at \$201,200 (with Ken Abernethy of Furman University)
- "Intelligent tutoring systems for chemistry", IDB/UWI Development Project (USA/Jamaica), 1996/04, 2-year grant valued at \$67,900 (with Robert Lancashire from the Department of Chemistry of the University of the West Indies)
- "Information Technology Survey", Jamaica Computer Society, 1994/06 Value J\$50,000 (with Gordon Shirley of the Department of Management Studies of the University of the West Indies)
- "REPAY: Repair policy determination based on AI learning methods", CEC DG XII (European Union), 1991/08, 3-year grant valued at £173,262
- "Computational modeling of the development of mental models of interactive devices", Medical Research Council (UK), 1991/07, 3-year grant valued at £129,453 (with Peter Bibby)
- "Planning and instruction", Medical Research Council, 1989/09, 3-year grant valued at £120,967 (with David Wood and Nigel Shadbolt)
- "Epistemic logic for multi-agent planning systems", Science and Engineering Council (UK), 1989, 2-year grant valued at £80,523 (with Nigel Shadbolt)

Selected Consultancy Engagements

- AllPoints Solutions, LLC, Senior Advisor, 2013 July – 2014 July
- Qatar University, 2009 May
 - Evaluation of a program proposal for a BS in ICT services
- Mona School of Business, University of the West Indies, Jamaica, 2009 January
 - Conducted a 3-day professional development workshop on IT Service Management Through ITIL
- Macon State College, Macon Georgia, 2007 January-April
 - Consultant on a possible ABET CAC accreditation project for its program in IT.
- College of Information Technology, United Arab Emirates University, 2007 February-March
 - Evaluation of curriculum revision proposals
- Department of Computer Science, Montclair State University, 2004 December
 - Evaluation of proposal for a new program in Information Technology.
- Department of Computer Information Systems and Information Technology, Purdue University, Calumet, 2004 August
 - Evaluation of existing programs in the department and formulation of recommendations for accreditation.
- Blue Cross Blue Shield, Columbia, SC, and Furman University, 2004-2007
 - Delivered 2-day courses on Risk Management
 - Delivered 2-day courses on Organizational Design
 - Delivered 1-day courses on Trends in Technology
 - Delivered 2- and 3-day courses on Project Management
 - Delivered 2-day courses on IT Quality Assurance
 - Delivered 1-day workshops on Trends in Technology
- IICD, Netherlands/Jamaica - Consultant, 2000 July
 - Provided general advice on a project entitled “Central and Satellite Agricultural Information Centers”, a project aimed at creating information systems to assist small vegetable farmers.

Fellowships and Awards

- Selected as one of two candidates from SPSU to participate in the University System of Georgia Executive Leadership Institute (ELI), September 2009. Details about this program can be found at http://www.usg.edu/executive_leadership_institute/. ELI is a 100-hour professional development program aimed at preparing participants for more senior academic administrative positions. Scholars are asked to shadow a more senior administrator at another USG institution, and I have been fortunate to have been given the opportunity to shadow Dr. Lendley Black, Provost and Vice-President for Academic Affairs at Kennesaw State University.
- Award in Recognition of Campus Most Outstanding Researcher, Award for most successfully commercialized research project "The Development of Web-Based Software for Interactive Display of Spectroscopic Data", Principal's Office - University of the West Indies, Mona, Kingston, Jamaica, 2003/01/20
- Charles R. Gibbs Faculty Award, College of Business Administration, Georgia Southern University, 2002
- Faculty Service Grant, Support for attendance at the Conference on Undergraduate Programs in Information Technology (Jointly with B. Price), Georgia Southern University, 2001 Oct
- Shell Distinguished Research Fellowship, University of the West Indies, 1994
- Postgraduate fellowship, University of Edinburgh, 1983-84
- Fellowship, Niels Stensen Foundation, 1981-82
- Price for the Best MA Thesis in Philosophy, 1981

Research and Publications

Current Research Interests

- IT Service Delivery Quality
- Computing Education
- Accreditation, Assessment and Quality Enhancement
- Higher Education Policy and Online Education
- Health Information Technology

Journal articles (Peer refereed)

1. Zhang, C., Reichgelt, H., Rutherford, R. & Wang, A. "Developing Health Information Technology (HIT) Programs and HIT Curriculum: The Southern Polytechnic State University Experience", *Journal of Information Systems Education*, 2014, Vol. 25 (4), 295-304.
2. Conn, S. & Reichgelt, H. "Cloud Computing in Support of Applied Learning: A Baseline Study of Infrastructure Design at Southern Polytechnic State University", *Information Systems Education Journal*, 2013, Vol. 11 (2), pp. 15-22.
3. Rao, L. Reichgelt, H. & Osei-Bryson, K.-M. "An approach for ontology development and assessment using a quality framework", *Knowledge Management Research and Practice*, 2009, Vol. 7, 260-276.
4. Mansingh, G., Osei-Bryson, K.-M., Reichgelt, H. "Building ontology based knowledge maps: a requirement for Knowledge Process Outsourcing", *Knowledge Management Research and Practice*, 2009, Vol. 7, pp. 37-51
5. Mansingh, G., Osei-Bryson, K.-M., Reichgelt, H. "Issues in Knowledge Access and Retrieval, and Sharing - Case Studies in a Caribbean Health Sector", *Expert Systems with Applications*, 2009, Vol. 36, No. 2, pp. 2853-2863.
6. Reichgelt, H. & Yaverbaum, G. "Accountability and accreditation: Putting Information Systems accreditation into perspective", *Communications of the Association for Information Systems*, 2007, Vol. 21, pp. 416-428.
7. Mansingh, G., Reichgelt, H., Osei-Bryson, K.-M. "CPEST: An expert system for the management of pests and diseases in the Jamaican coffee industry", *Expert Systems with Applications*, 2007, Vol. 32, No. 1, pp. 184-192.
8. Aasheim, C., Gowan, A., Reichgelt, H. "Establishing an assessment process for a computing program". *Information Systems Education Journal*, 2007, Vol. 5, No 1. <http://isedj.org/5/1/>.
9. Abernethy, K., Piegari, G, Reichgelt, H. "Teaching project management: An experiential approach" *The Journal of Computing Sciences in Colleges*, 2007, Vol. 22, No. 3, pp. 198-205.
10. Lawson, E., Reichgelt, H., Lunt, B., Ekstrom, J, Kamali, R., Miller, J., Gorka, S. "The Information Technology model curriculum" *Information Systems Education Journal*, 2006, Vol.4, No. 79. <http://isedj.org/4/79/>.
11. Ekstrom, J., Gorka, S., Kamali, R. Lawson, E, Lunt, B, Miller, J., Reichgelt, H. "The Information Technology model curriculum". *Journal of Information Technology Education*, 2006, Vol. 5, pp. 343-361.
12. Aasheim, C., Lee, C.-K., Reichgelt, H. "An implementation of the IT fundamentals knowledge area" *Journal of Information Technology Education*, 2006. Vol. 5, pp. 373-388.
13. Zhang, A., Reichgelt, H. "Product complexity as a determinant of transaction governance structure: An empirical comparison of web-only and traditional banks." *Journal of Electronic Commerce and Organizations*, 2006, Vol. 4, No 3, 1-17

Han Reichgelt, Resume

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14. Tabatabaei, M., Schrottner, B., Reichgelt, H. "Target populations for online education" *International Journal on E-Learning*, 2006, Vol. 5, No 3, 401-414.
15. Lee, C.K., Yoo, S. & Reichgelt, H. "Skill requirements for information technology managers in South Korea", *Information Systems Review in South Korea*, 2005, Vol. 7, No. 2, 129-139.
16. Abernethy, K., Gabbert, P., Treu, K., Piegari, G., Reichgelt, H. "Impact of the emerging IT discipline on computing curricula: Some experiences" *The Journal of Computing Sciences in Colleges*. 2005, Vol. 21, No. 2, 237-243.
17. Lunt, B., Ekstrom, J., Lawson, E., Kamali, R., Miller, J., Gorka, S., Reichgelt, H. "Defining the IT curriculum: The results of the past 3 years" *Journal of Issues in Informing Science and Information Technology*, 2005, 2, 259-270.
18. Tabatabaei, M. & Reichgelt, H. "The effect of prior exposure to project management techniques on project-based courses." *Issues in Information Systems*, 2005, Vol. 6, No 1, 398-404.
19. Jovanovic, V., Harris, J., Chambers, R., Reichgelt, H., McKinnon, R., Butler, E.S., Mrdalj, S, Shoemaker, D., "Programming principles – Instructors' top list", *Issues in Information Systems* 2004, Vol. 5, No. 2, 558-564.
20. Kung, H.-J., Reichgelt, H., "An alternative technique to improve IS/IT students' learning of database normalization", *Journal of Informatics Education Research* 2004, Vol. 6, No. 3, 45-55
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2. Clarke, F., Reichgelt, H., "The importance of explicitly stating educational objectives in computer science curricula", *SIGCSE Bulletin inroads*, December 2003, Vol. 35, No. 4, 47-50
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2. Reichgelt, H., "*Knowledge Representation: An AI perspective*", Norwood, NJ, Ablex, 1991
3. Jackson, P., H. Reichgelt, van Harmelen, F. (eds), "*Logic-Based Knowledge Representation*." Cambridge, MA, The MIT Press, 1989.

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2. Mansingh, G, Reichgelt, H., Osei-Bryson, K.-M. "Managing Expert Knowledge to Assist in the Management of Coffee Pests and Diseases in Jamaica". In *Knowledge Management for Development: Domains, Strategies and Technologies for Developing Countries*, Eds: Mansingh, G, Rao-Graham, L., Osei-Bryson, K.-M., Springer Science + Business Media, 2014, pp 43-56.
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43. Rao, L., Reichgelt, H., "Combining traditional databases and theorem provers in the design of an Environmental Information System", *FLAIRS-95*, Pp. 143-147 1995
44. Downs, J., Reichgelt, H., Shadbolt, N., "Automatic derivation of world update schemes", *Proc. Second International Conference on AI Planning Systems*, Pp. 237-243 1994
45. Vila, L., Reichgelt, H., "Temporal reasoning based on token reification", *PRODE '93*, Pp. 261-273 1993
46. Reichgelt, H., Shadbolt, N., Wood, D., Wood, H., "EXPLAIN: On implementing more effective tutoring systems", *AISB-93*, Pp. 239-249, Society for the Study of Artificial Intelligence and the Simulation of Behavior, April 1993
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48. Major, N., Reichgelt, H., "COCA: A shell for intelligent tutoring systems", *Intelligent Tutoring Systems: Proceedings of the Second International Conference.*, Pp. 523-530 1992
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50. Downs, J., Reichgelt, H., "Integrating classical and reactive planning within an architecture for autonomous agents", *Proceedings of the European Workshop on Planning and Scheduling.*, Pp. 13-26, Sankt Augustine, Germany, March 1991
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53. Reichgelt, H., Shadbolt, N., "Planning as theory extension", *AISB-89*, Pp. 191-199, Brighton, UK, Society for the Study of Artificial Intelligence and the Simulation of Behaviour, April 1989
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58. Reichgelt, H., "Semantics for reified temporal logic", *AISB 87*, Pp. 49-63, Edinburgh, Society for the Study of Artificial Intelligence and the Simulation of Behaviour, April 1987
59. Reichgelt, H., van Harmelen, F., "Relevant criteria for choosing an inference engine in expert systems", *Expert Systems '85*, Pp. 21-31, Cambridge 1985

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1. Wolz, U., Cassel, L., Mackellar, B., Peckham, J., Spradling, C., Reichgelt, H., Westbrook, S., "Interdisciplinary computing in many forms", *Proc SIGCSE 2014 Technical Symposium on Computer Science Education*, Atlanta, GA, March, 2014.

2. Yaverbaum, G., Lidtke, D., Reichgelt, H., Zweben, S. "Outcomes-based computing accreditation: program assessment (Panel Presentation)", *Proc. 38th SIGCSE Technical Symposium on Computer Science Education*, Pp. 281-282, Covington, KY, February 2007.
3. Zweben, S., Reichgelt, H., Yaverbaum, G. "Outcomes-based computing accreditation criteria (Panel Presentation)" *Proc. 37th SIGCSE Technical Symposium on Computer Science Education*, Pp. 129-130, Houston TX, February 2006.
4. Zweben, S., Reichgelt, H., Yaverbaum, G., "Computing accreditation: a new criteria structure and a new flexibility (Panel Presentation)", *Proc 36th SIGCSE Technical Symposium on Computer Science Education*, Pp 560-561, St Louis, MO, February 2005.

Refereed: Editor

1. Reichgelt, H., "Computers and legal education", *Annual Conference Commonwealth legal education association*, Pp. 106-112, Ocho Rios, Jamaica, 1998
2. Reichgelt, H., "Science and technology as an investment in knowledge and knowledge based industries", *10th Annual Conference Scientific Research Council*, Pp. 151-158, Kingston, Jamaica, 1997
3. Reichgelt, H., Girvan, N., "A comparison of policies for expanding the local software industry", *13th Annual Conference Jamaica Computer Society*, Montego Bay, Jamaica, 1996
4. Reichgelt, H., "Expert systems", *12th Annual Conference Jamaica Computer Society*, Ocho Rios, Jamaica.
5. Hatzilygeroudis, I., Reichgelt, H., "The inheritance mechanism of a system integrating logic in objects", *Proc. of the 6th Conference IEEE ICTAI*, Pp. 724-727, 1994
6. Reichgelt, H., "Getting computers to teach", *11th Annual Conference Jamaica Computer Society*, Ocho Rios, Jamaica, 1994
7. Major, N., Reichgelt, H., Shadbolt, N., "Sisyphus - Problem solving using ProtoKEW", *Sisyphus '91: Models of Problem Solving*, Sankt Pauli, Germany 1992
8. Hatzilygeroudis, I., Reichgelt, H., "Reasoning in a system for integrating logic and objects", *Proc. AAAI fall symposium on hybrid representations*, Sydney, Australia 1991
9. Clarke, P., Reichgelt, H., "Explorations in representation change", *Proc IJCAI Workshop on Evaluating and Changing Representation in Machine Learning 1991*
10. Kiss, G., Reichgelt, H., "Towards a semantics of desire", *Proc MAAMAW-91 1991*

Other Publications

Book Reviews

1. Reichgelt, H., "Forms of representation: Review of Peterson, D. (1996) *Forms of Representation: An Interdisciplinary Theme for Cognitive Science*", *Minds and Machines*, 2000, Pp. 455-457
2. Reichgelt, H., "A review of van Dijk, T. and Kintsch, W. (1983) *Strategies for Discourse Comprehension*. New York; Academic Press", *Journal of Semantics*, 1985, Pp. 275-278

Other

1. Reichgelt, H. "*MOOCs, YouTube, and Higher Education*". Keynote Presentation. Consortium for Computing Sciences in Colleges, South-East Conference, November 2012
2. Preston, J. & Reichgelt, H. "Slaying Dragons and Leveling Up: A Quest-Based Approach to Higher Education". Paper presented at the 4th Annual Polytechnic Summit, June 2012.

3. Ekstrom, J., Gorka, S., Kamali, R., Lawson, E., Lunt, B., Miller, J. & Reichgelt, H. *"Computing Curricula: Information Technology Volume"*. April 2005.
4. Reichgelt, H., *"Computers that think: Artificial Intelligence in a Developing Country"*. Inaugural Lecture, Kingston, Jamaica, 1996.

Work in Progress

1. A paper tentatively entitled "Disaggregating Higher Education: Where Real Disruption May Come From."
2. With R. Halstead-Nussloch, a textbook tentatively entitled "IT System Acquisition and Implementation."
3. MBA student Aneesha Jennings and I are conducting a study to establish correlations between certain features of skilled nursing facilities, such as size, ownership structure, staff levels and deficiencies found in the facilities, as measured through issues identified by American Health Care Association (AHCA) in their survey of the facilities and/or Medicare penalties.

MARTINA K. SCHMIDT

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E-mail: schmidt@usfsp.edu**EDUCATION**

Florida Atlantic University	Finance	1994 - 1998	Ph.D.
Florida Atlantic University	International Marketing	1991 - 1993	MBA
Florida Atlantic University	International Business	1989 - 1991	BA

AREAS OF INTEREST

Research: Corporate Finance, Real Estate, Investments, International Finance, Mutual Funds, Closed-End Funds, Online Education

Teaching: Principles of Finance, Corporate Finance, Real Estate, International Finance

EXPERIENCE

University of South Florida *Instructor Level 2* 2002 - present Full Time

- Taught Principles of Finance, Principles of Finance Online, Advanced Corporate Finance, International Finance and Real estate in the undergraduate and MBA programs (both face to face and online).

- Served as a member of multiple university and college committees

BestWeather, Inc. *Corporate Secretary* 2011 - present Part Time

- Managed company finances and provided general business consulting
- Provided investment strategies in the commodities markets
- Served as the Corporate Secretary

Global Business Advisory Services, LLC. *Managing Partner* 2008 - present Part Time

- Provided global business consulting services & assisted global firms with debt/equity financing

University of South Florida *Adjunct Instructor* 2001 - 2002 Part Time

- Taught International Finance and Advanced Corporate Finance

Jet Stream Enterprises *Vice President* 1998 - 2002 Full Time

- Managed company finances
- Assisted in aviation parts sales & marketing
- Helped with acquisition and development of real estate investments
- Maintained computer network

Florida Atlantic University *Teaching Assistant* 1995 - 1998 Part Time

- Taught Corporate Finance
- Directed an independent study entitled, "The Effect of Internet Commerce on the Securities Industry"

Florida Atlantic University *Research Assistant* 1994 - 1995 Part Time

- Conducted research in the areas of closed-end funds, CEO compensation, real estate investment trusts, bond ratings of US companies and foreign currency fluctuations

Taurus Investment Group *Assistant to the President* 1993 - 1994 Full Time

- Developed commercial real estate financial analyses and investment summaries
- Assisted in marketing commercial real estate projects
- Edited company's German newsletter

Pulte Home Corporation *Computer Coordinator* 1992 - 1993 Full Time

- Managed computer network for Florida offices
- Helped to market new residential properties

DISSERTATION

Topic: "The Performance Persistence of Closed-End Funds."

Description: The study investigates whether the market price and net asset value (NAV) returns of U.S. registered closed-end funds exhibit persistence. It also investigates the return persistence of international closed-end funds and whether persistence is related to various fund characteristics, such as size, goal, expenses, turnover, fund family membership, fund experience, and the exchange a fund is traded on. The results show evidence of persistence for both market price and NAV returns. International funds show more persistence than domestic funds in terms of market prices but less persistence in terms of NAVs. Persistence is mostly attributed to winning funds and funds with lower expenses.

PUBLISHED JOURNAL ARTICLES (PEER-REVIEWED)

"Economies of Scale for Real Estate Investment Trusts," co-authored with Dr. Thomas M. Springer, *Journal of Real Estate Research*, 1997, vol. 14, no. 3, pp. 275-290. (DBS)

"The Persistence of International Mutual Fund Performance," *Global Finance Journal*, 1998, vol. 9, no. 2, pp. 225-240. (DBS)

"Sources of Scale Economies for Real Estate Investment Trusts," co-authored with Dr. Thomas M. Springer, *Real Estate Finance*, 1998, vol. 14, no. 4, pp. 47-56. (DBS)

"Differences in Scale Economies Among Real Estate Investment Trusts: More Evidence," co-authored with Dr. Thomas M. Springer, *Real Estate Finance*, 1998, vol. 15, no. 3, pp. 37-44. (DBS)

"Why does Performance Persistence vary among Closed-End Funds?" co-authored with Dr. Jeff Madura, *Journal of Financial Services Research*, 2000, vol. 17, no. 2, pp. 127-147. (DBS)

"The Performance Persistence of Closed-End Funds," co-authored with Dr. Jeff Madura, *Financial Review*, 2000, vol. 35, pp. 33-52. (DBS)

"The Performance Persistence of Foreign Closed-End Funds," co-authored with Dr. Jeff Madura, *Review of Financial Economics*, 2002, vol. 11, no. 4, pp. 263-285. (DBS)

"Evidence of Scale Economies for Closed-End Funds," co-authored with Dr. Gary Patterson, *Journal of Business Disciplines*, 2007, Fall/Winter edition, vol. VIII, no. 1, pp.17-48. (DBS)

"Finanzdienstleistung international: von Kaisern und Koenigen", co-authored with Dr. Micha Bergsiek, and Dr. Marina Kolesnikova, *QFZ-DIALOG - Das Magazin für die Zukunft der*

Finanzberatung, QFZ-INITIATIVE, Corporate Publishing Services, GmbH, 2008, 1. Jahrgang, Ausgabe 01, pp. 42-43. (AIS)

“Customer Preferences of Financial Services Across the US, Germany and Russia”, co-authored with Dr. Micha Bergsiek, University of Paderborn, Germany, and Dr. Marina Kolesnikova, Saint-Petersburg State University, Russia, *Journal of International Business and Cultural Studies*, 2009, February, vol. 1, pp. 110-130. (DBS and AIS)

“How to Align an Online Finance Course Using Capital Budgeting Analysis”, *Academy of Business Disciplines Journal*, 2013, Volume 5, Number 1, pp. 1-20 (TLS) (20% acceptance rate)

“Mortgage Fraud: Schemes, Red Flags and Responses”, co-authored with Nicole Stowell, Carl Pacini, and Kathryn Keller, *Journal of Forensic and Investigative Accounting*, 2014, Volume 6, Issue 2, July-December, pp. 225-259 (AIS), B Rating

“An Analysis of Mortgage Fraud and Its Solutions”, co-authored with Nicole Stowell, *Journal of Business and Economic Perspectives*, 2016, Volume XLIII, Number I, Spring/Summer, pp. 75-102 (AIS), C Rating

“Certifying Business Courses through Quality Matters”, co-authored with Nicole Stowell, *Journal of the Academy of Business Education*, forthcoming in 2017 (TLS), C+ Rating

“There is no Free Lunch: Understanding and Preventing Estate Planning Fraud”, *Journal of the Academy of Business Education*, accepted (AIS), C+ Rating

“Healthcare Fraud Under the Microscope: Improving its Prevention”, co-authored with Nicole Stowell and Nathan Wadlinger, *Journal of Financial Crime*, accepted, (AIS), C Rating

RESEARCH IN PROGRESS

“Improving Online Courses through Quality Matters: Course Activities/Learner Interaction and Accessibility/Usability” (TLS)

CONFERENCE PAPERS AND PRESENTATIONS (PEER-REVIEWED)

“Economies of Scale for Real Estate Investment Trusts,” co-authored with Dr. Thomas M. Springer, presented at the 1996 Southern Finance Association Annual Meeting, the 1997 Real Estate Research Institute Annual Meeting, and the 1997 American Real Estate Society Annual Meeting (DBS)

“The Persistence of International Mutual Fund Performance,” presented at the 1998 Financial Management Association Meeting (DBS)

“The Performance Persistence of Closed-End Funds,” presented at the 1998 Financial Management Association Meeting (DBS)

“Evidence of Scale Economies for Closed-End Funds”, presented at the 2005 Academy of Business Disciplines Annual Meeting (DBS)

“Customer Preferences of Financial Services across the US, Germany and Russia”, co-authored with Dr. Micha Bergsiek, University of Paderborn, Germany, and Dr. Marina Kolesnikova, Saint-Petersburg State University, Russia, presented at the 2007 Academy of Business Disciplines Annual Meeting. (DBS and AIS)

“Lessons from Teaching Undergraduate Finance Online”, presented at the 2011 Academy of Business Disciplines Annual Meeting. (TLS)

“Applying the Concept of Alignment in a Finance Class”, presented at the 2012 Academy of Business Disciplines Annual Meeting. (TLS)

“Taking a Bite Out of Mortgage Fraud”, presented at the 2014 mid-year Forensic and Investigative Accounting Section of the America Accounting Association annual conference. (AIS)

“An Analysis of Mortgage Fraud after the U.S. Mortgage Crisis, co-presented at the Academy of Business Disciplines Annual Meeting in Ft. Myers, November 6th-8th, 2014, with Nikki Stowell. (AIS)

“Certifying Business Courses Through Quality Matters” presented at the Academy of Business Disciplines Annual Meeting in Ft. Myers, November 12th-14th, 2015, with Nikki Stowell. (TLS)

“Protecting Against Estate Planning Fraud: A Tutorial for Financial Planners”, presented at the 17th annual ABE/FEA Conference in Ft. Lauderdale, September 29th-October 1st, 2016, with Nikki Stowell. (AIS)

“Improving Online Courses through Quality Matters: Course Activities/Learner Interaction and Accessibility/Usability”, accepted for presentation at the 18th annual ABE/FEA Conference in Savannah, Georgia, September 14-16th, 2017, with Nikki Stowell. (TLS)

PROCEEDINGS

“Protecting Against Estate Planning Fraud: A Tutorial for Financial Planners”, 2016, ABE/FEA Conference in Ft. Lauderdale, with Nikki Stowell. (AIS)

SERVICE

- Member, Search Committee, USFSP Wealth Management Center Director and Unit head, 2017
- Member, USFSP Center for Innovative Teaching and Learning (CITL) Advisory Group, 2015-present
- Faculty Advisor – USFSP “Bulls out Loud” student club, 2014 – 2016
- Co-Chair, USFSP Unstoppable Campaign Committee, 2014
- Member, USFSP Distance Learning Committee, 2013-2015
- Member, USFSP College of Business Scholarship Committee, 2011 - 2014
- Member, USFSP Steering Committee for Distance Learning classes, 2010-present
- Member, USFSP Faculty Development Committee, 2011
- Member, USFSP Global Committee, 2006-2010
- Member, USFSP Teaching and Research Committee, 2008/2009

- Member, 100 Central Ave, Sarasota, Homeowners' Association Finance Committee, 2006-2013
- Member, USFSP Teaching Awards Committee, 2008
- Member, USFSP Undergraduate Curriculum Committee, 2004-2006
- Member, USFSP Graduate Curriculum Committee, 2003/2004
- Member, USFSP Search Committee, Finance, 2002/2003
- Member, USFSP Search Committee, Accounting, 2002/2003
- Member, USFSP Search Committee Program of Social Responsibility & Corp. Reporting, 2003
- Member, USFSP Undergraduate Assessments Committee, 2002/2003

HONORS

- Recipient of the College of Business Teaching Excellence Award, USFSP, 2014
- Recipient of the QM designation for Real Estate Decision Making, Summer 2014
- Best teaching innovation award, Academy of Business Disciples Annual Meeting, 2012
- Best session presentation award, Academy of Business Disciples Annual Meeting, 2011
- First Instructor to be promoted to Level 2 Instructor in the College of Business USFSP, 2011
- Recipient, Distance Learning Award, University of South Florida, 2010, 2013, 2015, 2016
- Member of the Florida Atlantic University Hall of Fame for academic and athletic achievements, 2008
- Recipient of the College of Business Teaching Excellence Award, USFSP, 2006
- Recipient of the Annual Dissertation Grant, Florida Atlantic University, 1997
- Recipient of the American Real Estate Society Manuscript Prize for the study "Economies of Scale for Real Estate Investment Trusts," co-authored with Dr. Thomas M. Springer, 1997
- Recipient of the Real Estate Research Institute Research Grant for the study "Economies of Scale for Real Estate Investment Trusts," co-authored with Dr. Thomas M. Springer, 1996/1997
- Honorary Faculty Member of the International Fraternity of Delta Sigma Phi, 1997
- Active-for-life member of the Honor Society of Phi Kappa Phi, 1997
- Member of the National Honor Society of Beta Gamma Sigma, since 1993
- Masters Champion, United States Professional Tennis Association (USPTA), Florida, 1995
- Member of the Broward Community College Hall of Fame for academic and athletic achievements, 1992
- NCAA All-American (Tennis), 1992
- Recipient of the BA with Honors, Florida Atlantic University, 1991
- President's List, Florida Atlantic University, 1990 and 1991
- National Dean's List 1987, 1988, and 1991
- First Team NJCAA Academic All-American, 1988
- NJCAA All-American (Tennis) 1987 & 88

OTHER ACTIVITIES AND SPECIAL SKILLS

- iQM (International Quality Matters) Member since 2016
- Certified "Quality Matters" (QM) Peer Reviewer for higher education and professional & continuing education since 2012
- Bilingual (German/English)
- Active, licensed Florida Real Estate Broker, licensed in real estate since 1995
- Licensed member, United States Professional Tennis Association (USPTA) since 1993
- National Champion, USTA 9.0 Mixed Doubles League, 2008
- 4th Place National Championships, USTA 10.0 Mixed Doubles League, 2010
- State Champion, USTA 4.5 Women's League, 2009 & 10.0 Mixed Doubles League, 2010

REFERENCES

Dr. Jeff Madura

Former Sun Trust Professor
of Finance
Florida Atlantic University
College of Business
Graduate School of Business
220 SE 2nd Avenue
Ft. Lauderdale, FL 33301
(561) 368-2260
jeffmadura@bellsouth.net

Dr. Gary Patterson

Associate Dean,
USFSP
Kate Tiedeman
College of Business
140 Seventh Ave South
St. Petersburg, FL 33701
(727)873-4154
pattersg@usfsp.edu

Hartmut Liebel

President & CEO
iQor
200 Central Ave.
One Progress Plaza, 7th Floor
St. Petersburg, FL 33701
(727)776-8874 (cell)
hartmut.liebel@iqor.com

VITA

Fall 2017

WILLIAM “MIKE” SINCLAIR

17030 Dennis Road

Lutz, FL 33558

office phone: 727-873-4295

e-mail: wsinclair@mail.usf.edu

EDUCATION

Georgia Southern University, Statesboro, GA
Master in Accounting, 2006

University of South Florida
Bachelor in Science, Business Administration, 1988

PROFESSIONAL CERTIFICATION

Certified Fraud Examiner, 2011
Certified Valuation Analyst, 2011
Certified Public Accountant, 2008

TEACHING INTERESTS

Tax, financial accounting, forensic accounting, business valuation, auditing

RESEARCH INTERESTS

Tax, small business valuation, valuation in financial reporting, white-collar crime

TEACHING EXPERIENCE

Instructor, University of South Florida, Fall 2014 to present

Undergraduate courses:

- ACG 4632, Auditing I
- TAX 4001, Concepts of Federal Income Taxation
- ACG 2021, Principles of Financial Accounting
- ACG 2071, Principles of Man

Adjunct Professor, University of South Florida, Spring 2013 to Summer 2014

Undergraduate courses:

- ACG 4632, Auditing I

Graduate Assistant, Georgia Southern University, 2005

Undergraduate courses:

- ACCT 2102, Introduction to Managerial Accounting

PROFESSIONAL EXPERIENCE

Internal Revenue Service

Revenue Agent (part-time)

Large Business and International, Global High Wealth, 09/14 – present

Group Manager

Large Business and International, Global High Wealth, 06/14 – 09/14

Revenue Agent

Large Business and International, Global High Wealth, 08/11 – 06/14

Small Business and Self Employed, Abusive Tax Avoidance Transactions, 02/11 – 08/11

Large Business and International, Communications, Technology and Media, 06/09 – 02/11

Small Business and Self Employed, Gulf States Area, 08/07 – 06/09

Dabbs, Hickman, Hill & Cannon, LLP

Staff Accountant – CPA Firm

2005 – 2007

SMP, LLP

Partner – Small Business Consulting Firm

2002 – 2004

Energizer Battery Company

Group Director, 04/01 – 11/02

Team Leader, 09/99 – 04/01

Customer Marketing Manager, 10/98 – 09/99

Unilever Home and Personal Care Products

Senior Customer Business Manager, 09/95 – 09/98

Business Planning Manager, 05/94 – 09/95

Customer Development Manager, 05/93 – 05/94

Retail Area Sales Manager, 10/91 – 05/93

Kraft Foods, Inc

Key Account Manager, 11/90 – 10-91

Sales Analyst, 05/89 – 11/90

Territory Manager, 09/88 – 05/89

CONSULTING EXPERIENCE

Tax, small business operations, business valuations, litigation support

HONORS AND AWARDS

Chancellor's Clinical Faculty Teaching Award for Academic year 2014-2015

Silver Helmet Award for 25 years of Service to Delta Sigma Pi

2014/2015 Regional Chapter Advisor of the Year for Delta Sigma Pi

Beta Alpha Psi Accounting Honor Society

Beta Gamma Sigma Business Honor Society

CPA Review Scholarship

Porter Keadle Moore Scholarship

SERVICE

University of South Florida St. Petersburg

Faculty Advisor, Delta Sigma Pi (Fall 2014 – present)

Community

Knights of Columbus

Member (2008 – present)

Treasurer (2008 – 2009)

Joey's Toy Box, Treasurer (March 2008-July 2015)

Kiwanis, member (2005-2011)

Saint Matthew's Catholic Church

Youth minister (2004-2008)

Pastoral council (2005 – 2007)

American Red Cross Board of Director (2006 – 2007)

Delta Sigma Pi, District Director (1991 – 1993)

PROFESSIONAL ASSOCIATIONS

Member, Association of Certified Fraud Examiners

Member, National Association of Certified Valuation Analysts

Item 10 - Consent Agenda

10/1/2019

10/1/2019 - 10/1/2019

10/1/2019 - 10/1/2019
 10/1/2019 - 10/1/2019
 10/1/2019 - 10/1/2019

10/1/2019 - 10/1/2019

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 10/1/2019 - 10/1/2019
 10/1/2019 - 10/1/2019

10/1/2019 - 10/1/2019

Item	Item	Item	Item
10/1/2019 - 10/1/2019	10/1/2019 - 10/1/2019	10/1/2019 - 10/1/2019	10/1/2019 - 10/1/2019

10/1/2019 - 10/1/2019

Item	Item	Item
10/1/2019 - 10/1/2019	10/1/2019 - 10/1/2019	10/1/2019 - 10/1/2019

10/1/2019 - 10/1/2019

Item	Item	Item	Item
10/1/2019 - 10/1/2019	10/1/2019 - 10/1/2019	10/1/2019 - 10/1/2019	10/1/2019 - 10/1/2019
10/1/2019 - 10/1/2019	10/1/2019 - 10/1/2019	10/1/2019 - 10/1/2019	10/1/2019 - 10/1/2019
10/1/2019 - 10/1/2019	10/1/2019 - 10/1/2019	10/1/2019 - 10/1/2019	10/1/2019 - 10/1/2019
10/1/2019 - 10/1/2019	10/1/2019 - 10/1/2019	10/1/2019 - 10/1/2019	10/1/2019 - 10/1/2019

10/1/2019 - 10/1/2019

- 1. The Board of Trustees shall take the following actions: 10/1/2019 - 10/1/2019
- 2. The Board of Trustees shall take the following actions: 10/1/2019 - 10/1/2019
- 3. The Board of Trustees shall take the following actions: 10/1/2019 - 10/1/2019
- 4. The Board of Trustees shall take the following actions: 10/1/2019 - 10/1/2019
- 5. The Board of Trustees shall take the following actions: 10/1/2019 - 10/1/2019
- 6. The Board of Trustees shall take the following actions: 10/1/2019 - 10/1/2019
- 7. The Board of Trustees shall take the following actions: 10/1/2019 - 10/1/2019
- 8. The Board of Trustees shall take the following actions: 10/1/2019 - 10/1/2019
- 9. The Board of Trustees shall take the following actions: 10/1/2019 - 10/1/2019
- 10. The Board of Trustees shall take the following actions: 10/1/2019 - 10/1/2019

1. The Board of Trustees is requested to approve the following items for inclusion in the Consent Agenda for the Board of Trustees Meeting on 11/15/2023:

- 1. The Board of Trustees is requested to approve the following items for inclusion in the Consent Agenda for the Board of Trustees Meeting on 11/15/2023:
- 2. The Board of Trustees is requested to approve the following items for inclusion in the Consent Agenda for the Board of Trustees Meeting on 11/15/2023:
- 3. The Board of Trustees is requested to approve the following items for inclusion in the Consent Agenda for the Board of Trustees Meeting on 11/15/2023:
- 4. The Board of Trustees is requested to approve the following items for inclusion in the Consent Agenda for the Board of Trustees Meeting on 11/15/2023:
- 5. The Board of Trustees is requested to approve the following items for inclusion in the Consent Agenda for the Board of Trustees Meeting on 11/15/2023:
- 6. The Board of Trustees is requested to approve the following items for inclusion in the Consent Agenda for the Board of Trustees Meeting on 11/15/2023:
- 7. The Board of Trustees is requested to approve the following items for inclusion in the Consent Agenda for the Board of Trustees Meeting on 11/15/2023:
- 8. The Board of Trustees is requested to approve the following items for inclusion in the Consent Agenda for the Board of Trustees Meeting on 11/15/2023:
- 9. The Board of Trustees is requested to approve the following items for inclusion in the Consent Agenda for the Board of Trustees Meeting on 11/15/2023:
- 10. The Board of Trustees is requested to approve the following items for inclusion in the Consent Agenda for the Board of Trustees Meeting on 11/15/2023:

Item	Description	Requesting Department	Requesting Manager	Requesting Date	Requesting Time	Requesting Location
1
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Item	Description	Requesting Department	Requesting Manager	Requesting Date	Requesting Time	Requesting Location
11
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11. The Board of Trustees is requested to approve the following items for inclusion in the Consent Agenda for the Board of Trustees Meeting on 11/15/2023:

12. The Board of Trustees is requested to approve the following items for inclusion in the Consent Agenda for the Board of Trustees Meeting on 11/15/2023:

13. The Board of Trustees is requested to approve the following items for inclusion in the Consent Agenda for the Board of Trustees Meeting on 11/15/2023:

APPENDIX G: Letters of Support

Dr. Martin Tadlock, Interim Regional Chancellor

Dr. Frank Biafora, Dean of the College of Arts and Sciences

Dr. Sridhar Sundaram, Dean of the Kate Tiedemann College of Business

Dr. Shun-Yung (Kevin) Wang, Chair Academic Program Committee, College of Arts and Sciences

Dr. Thomas Smith, Chair Undergraduate Council, University of South Florida St. Petersburg



October 4, 2017

To: Curriculum committees

From: Martin Tadlock, Interim Regional Chancellor 

Re: Computational and Applied Mathematics Program Proposal

I am in full support of the proposal for the new degree program in Computational and Applied Mathematics. As a regional, comprehensive university, it is essential to offer core programs to our students that prepare them for career entrance and graduate school while responding to the workforce needs in Florida. This new program will help us build that core and meet those expectations.

We have a five-year master academic plan approved by the USF System Board of Trustees. This program is included on that plan and moving this program to approval this year with a fall of 2018 launch is consistent with that academic plan.

We are committed to providing the resources needed to ensure the success of our students in the program, and we have those available through STEM funds. We have already approved funding for two new faculty lines to be filled for fall of 2018.

I appreciate the work being done by all involved in this effort.

OFFICE OF THE REGIONAL CHANCELLOR
University of South Florida St. Petersburg • 140 7th Ave South, BAY208 • St. Petersburg, FL 33701
(727) 873-4151 • Fax (727) 873-4131 • www.usfsp.edu



October 3, 2017

Dear USFSP and USF System Academic Review Committees/Teams,

It is with great pleasure that I write this letter in support of Bachelors of Science degree program in Computational and Applied Mathematics. From the very early stages of deliberation and development this program has been intentionally built to be as relevant, distinctive, collaborative and nimble as possible.

The demand for mathematical and data analytical skills perhaps has never been more important than today and the job market for graduates with applied quantitative capabilities is promising and stronger than ever. Our students will be prepared through rigorous coursework and required engagement/internship experiences for direct entry into high wage careers and/or for entry into further graduate study.

With respect to being distinctive you will appreciate that no other institution within the State University System (SUS) offers this program. We anticipate that students seeking to pursue exciting careers that integrate mathematics from an applied (e.g. data analytics, business intelligence) standpoint will be drawn to this particular program, as will students who recognize the utility of this degree as a second major. You will also notice that this program benefits by being interdisciplinary and collaborative, having been built from the ground up with direct input from faculty from the College of Arts and Sciences, College of Education and the Kate Tiedemann College of Business. Once the program launches in 2018 we will monitor student interest, graduate success and market demand and adjust the curriculum quickly to meet head-on any future opportunities.

In terms of the budget, I wish to acknowledge that the College is well positioned financially to launch this program in 2018 and to grow overtime. Recurring funds have already been committed and set aside to hire the necessary faculty.

For all these reasons and more, I cannot help be extremely excited about this new major. Thank you for your careful consideration. I hope that you too see that this is the right time and place to launch the Bachelors of Science degree in Computational and Applied Mathematics.

I wish to thank Dr. Kathleen Gibson-Dee and the many members of the writing team (Dr. Maria Leite, Edwin Abaquita, Dr. Armando Hoare, Dr. Melanie Reidinger-Whitmore, Dr. Varol Kayhan, Dr. Han Reichgelt, Patricia Pettigrew, Serge Desir, Holly Kickliter, Paul Schultz, Lauren Freedman, and Lesa Shouse) for their dedication and collegial approach to pulling together this exceptional proposal in record time.

Sincerely,

A handwritten signature in blue ink that reads "Frank A. Biafora".

Frank Biafora, Ph.D.
Dean

University of South Florida St. Petersburg
• 140 Seventh Avenue South, DAV 100 • St. Petersburg, FL 33701-5016
• <http://www.stpt.usf.edu/>



KATE TIEDEMANN
COLLEGE OF BUSINESS

Office of the Dean

M E M O

To: Dr. Kathleen Gibson-Dee

From: Sridhar Sundaram, D.B.A.

A handwritten signature in black ink, appearing to read "Sridhar", is written over the "From:" line.

**Subj: Letter of Support for the Program Proposal in Computational and Applied
Mathematics (CIP 27.0304)**

Date: October 5, 2017

Cc: Dr. Martin Tadlock, RVCAA

I would like to express my full support for the Bachelor of Science program in Mathematics: Computational and Applied. The program proposal was coordinated with the Kate Tiedemann College of Business faculty. One of the concentrations proposed in the program is on "Data Analytics and Business Intelligence" which will include courses from the College of Business. We look forward to working in collaboration with the Mathematics faculty in delivering this program.

Thanks
Sridhar



October 13, 2017

Dear Dr. Gibson-Dee,

On behalf of the College of Arts and Sciences Academic Program Committee (APC), I am delighted to write this letter in support of Bachelors of Science degree program in Computational and Applied Mathematics. The proposal of this major is anonymously approved, contingent upon some edits and modifications, by APC attending members on October 13, 2017.

Sincerely,

A handwritten signature in black ink, appearing to read "Shun-Yung Kevin Wang". The signature is fluid and cursive, with a long horizontal stroke at the end.

Shun-Yung Kevin Wang
Chair, Academic Program Committee
College of Arts and Sciences



November 8, 2017

Kathleen Gibson-Dee
Quality Enhancement Plan Director
Mathematics and Statistics Coordinator
University of South Florida St. Petersburg

Dear Kathleen,

I am pleased to report that today the University of South Florida St. Petersburg Undergraduate Council approved without changes the proposal for a new Bachelor of Science degree in Computational and Applied Mathematics.

Thank you for all your work compiling the proposal.

Sincerely yours,

A handwritten signature in black ink that reads "Thomas W. Smith". The signature is written in a cursive style with a large, prominent "T" and "S".

Thomas W. Smith
Chair, Undergraduate Council
Professor, Political Science

Cc: Shari Schwartz

Agenda Item: FL 106

USF Board of Trustees
March 6, 2018

Issue: M.S. Advertising – CIP 09.0900

Proposed action: Approval

Executive Summary: The goal of the M.S. in Advertising is to provide advanced education in professional persuasive messaging based on core principles of information-age technologies, including use of applied statistics, data mining, and data visualization for the development of professional business principles and practices in advertising. The degree is designed as a professional degree and will attract both newly graduated bachelor's degree holders as well as early- and mid-career advertising professionals who seek to strengthen their data and analytical skills in emerging digital media. The M.S. in Advertising will be part of a broad collaborative effort between the Zimmerman School of Advertising and Mass Communications in the College of Arts and Sciences and the Marketing Department in the Muma College of Business. This new interdisciplinary degree is designed to merge the creative function of advertising (creative, strategy, planning, and management) with the business function and analytical capabilities (data coding, return on investment, performance analytics, and market research) that the current market demands. This proposal would provide an advertising-specific, data- and business-driven master's degree in the nation's 13th largest media market.

Financial Impact: There is no financial impact because all costs for the new program will borne by the existing Mass Communications' budget, as current graduate faculty will transition from the existing M.A. in Mass Communications strategic communications courses to the new M.S. degree.

Strategic Goal(s) Item Supports:

- USF Tampa Strategic Plan Goal 1: Student Success

BOT Committee Review Date: ACE February 13, 2018

Supporting Documentation Online (please circle):

Yes

No

[BOG Proposal](#)

USF System or Institution specific: USF Tampa

Prepared by: Wayne Garcia, Director, Zimmerman School of Advertising and Mass Communications

Board of Governors, State University System of Florida

Request to Offer a New Degree Program

(Please do not revise this proposal format without prior approval from Board staff)

University of South Florida	Fall 2018
University Submitting Proposal	Proposed Implementation Term
College of Arts and Sciences	Zimmerman School of Advertising and Mass Communications
Name of College(s) or School(s)	Name of Department(s)/ Division(s)
Mass Communications	Master of Science in Advertising
Academic Specialty or Field	Complete Name of Degree
09.0900 Public Relations, Advertising & Applied Communication	
Proposed CIP Code	

The submission of this proposal constitutes a commitment by the university that, if the proposal is approved, the necessary financial resources and the criteria for establishing new programs have been met prior to the initiation of the program.

Date Approved by the University Board of Trustees	President	Date
Signature of Chair, Board of Trustees	Date	Vice President for Academic Affairs
		Date

Provide headcount (HC) and full-time equivalent (FTE) student estimates of majors for Years 1 through 5. HC and FTE estimates should be identical to those in Table 1 in Appendix A. Indicate the program costs for the first and the fifth years of implementation as shown in the appropriate columns in Table 2 in Appendix A. Calculate an Educational and General (E&G) cost per FTE for Years 1 and 5 (Total E&G divided by FTE).

Implementation Timeframe	Projected Enrollment (From Table 1)		Projected Program Costs (From Table 2)				
	HC	FTE	E&G Cost per FTE	E&G Funds	Contract & Grants Funds	Auxiliary Funds	Total Cost
Year 1	24	18.00	\$9,065	\$163174			\$163174
Year 2	29	21.75					
Year 3	36	27.00					
Year 4	43	32.25					
Year 5	50	37.50	\$8,169	\$306349			\$306349

Note: This outline and the questions pertaining to each section must be reproduced within the body of the proposal to ensure that all sections have been satisfactorily addressed. Tables 1 through 4 are to be included as Appendix A and not reproduced within the body of the proposals because this often causes errors in the automatic calculations.

INTRODUCTION

I. Program Description and Relationship to System-Level Goals

- A. Briefly describe within a few paragraphs the degree program under consideration, including (a) level; (b) emphases, including majors, concentrations, tracks, or specializations; (c) total number of credit hours; and (d) overall purpose, including examples of employment or education opportunities that may be available to program graduates.

The M.S. in Advertising will be part of a broad collaborative effort between the Zimmerman School of Advertising and Mass Communications in the College of Arts and Sciences (CAS) and the Marketing Department in the Muma College of Business (MCOB). This new interdisciplinary degree is designed to merge the creative function of advertising (creative, strategy, planning, and management) with the business function and analytical capabilities (data coding, return on investment, performance analytics, and market research) that the current market demands. It is aimed primarily at professionals in early- to mid-career who did not have access to new, emerging digital analytical tools when they first began their advertising training, as well as new graduates from undergraduate advertising programs who want to enhance their skills sets and employability by diving deeper into these new digital technologies. This proposal would provide an advertising-specific, data- and business-driven master's degree in the nation's 11th largest media market. Students in this program will have the opportunity to pursue learning and research in a major media market where a great number of advertising agencies and researchers live and work. The two other SUS universities that offer a graduate degree in this CIP are Florida State University (a Master's in Integrated Marketing Communication in media market #107) and the University of North Florida (under the name Professional Communication, in market #47).

The goal of the M.S. in Advertising is to provide advanced education in professional persuasive messaging based on core principles of information-age technologies, including use of applied statistics, data mining, and data visualization for the development of professional business principles and practices in advertising. The degree is designed as a professional degree and will attract both newly graduated bachelor's degree holders as well as early- and mid-career advertising professionals who seek to strengthen their data and analytical skills in emerging digital media. These professions include graphic designer, media planner, advertising account executive, creative director, marketing manager, social media manager, content developer, communications director, and advertising production.

Program Summary:

- (a) Level: M.S. degree in Advertising (CIP 09.0900);
- (b) Emphases: Graduate students pursuing this degree must complete core courses focused on combining advertising creative strategies from a mass communication perspective with business principles in marketing;
- (c) Credit Hours: The proposed new graduate degree can be completed in 36 credit hours and includes an option for an applied project or a practicum. It is not a thesis degree.
- (d) Overall Purpose: This new degree will produce students trained to fill an increasing local and statewide demand for entry- and mid-level advertising professionals:
 - Marketing research analysts: +21.7%
 - Marketing managers: +16.0%
 - Advertising and promotion managers: +12.4%
 - Advertising sales agents: +4.0%

The job growth projections through 2024 are taken from the 2016-2024 Statewide Employment Projects at [floridajobs.org](http://www.floridajobs.org) and data at the U.S. Department of Labor Bureau of Labor Statistics. (<http://www.floridajobs.org/labor-market-information/data-center/statistical-programs/employment-projections> and https://www.bls.gov/emp/ep_table_102.htm.)

Students graduating from USF with this degree also may choose to continue their education in a variety of fields that might include doctoral degree programs in Mass Communications, Communication, Marketing, Advertising and Information Studies, to name a few.

- B. Please provide the date when the pre-proposal was presented to CAVP (Council of Academic Vice Presidents) Academic Program Coordination review group. Identify any concerns that the CAVP review group raised with the pre-proposed program and provide a brief narrative explaining how each of these concerns has been or is being addressed.**

The pre-proposal was approved by the CAVP in late Spring 2016. No concerns were put forward by the review group.

- C. If this is a doctoral level program please include the external consultant's report at the end of the proposal as Appendix D. Please provide a few highlights from the report and describe ways in which the report affected the approval process at the university.**

Not applicable; this is not a doctoral level program.

- D. Describe how the proposed program is consistent with the current State University System (SUS) Strategic Planning Goals. Identify which specific goals the program will directly support and which goals the program will indirectly support (see link to the SUS Strategic Plan on [the resource page for new program proposal](#)).**

As noted above, the goal of the M.S. in Advertising is to provide advanced education in data-informed, professional persuasive messaging, based on core principles of information age technologies.

These goals are consistent with the State University System's 2025 Strategic Plan by integrating information technologies into the heretofore "soft," or creative, arts of public relations, advertising and applied communication, as they are increasingly practiced. The interdisciplinary and collaborative nature of the major is also consistent with the teaching and learning goals in the Strategic Plan.

- E. If the program is to be included in a category within the Programs of Strategic Emphasis as described in the SUS Strategic Plan, please indicate the category and the justification for inclusion.**

The Programs of Strategic Emphasis Categories:

1. Critical Workforce:
 - Education
 - Health
 - Gap Analysis
2. Economic Development:
 - Global Competitiveness
3. Science, Technology, Engineering, and Math (STEM)

Please see the Programs of Strategic Emphasis (PSE) methodology for additional explanations on program inclusion criteria at [the resource page for new program proposal](#).

The proposed M.S. is based on the principle that an infusion of empirical science and information technologies are critical for decision-making in professional advertising in the 21st Century. This unique,

collaborative major is market-focused on regional, state, and national workforce development in advertising and related professional communications fields.

The 09.0900 CIP is designated as an area of strategic emphasis by the Board of Governors under the Critical Workforce: Gap Analysis category, defined as:

“...degree programs leading to the occupational categories identified as projected to be critically under-supplied in the Higher Education Access and Educational Attainment Commission’s gap analysis of labor market projections and related degree production. Consequently, the academic programs included in this category will correspond to Florida’s high need, high wage occupational areas identified through the gap analysis. Universities will still be expected to work with local industries and employers to identify academic programs needed to support local or regional economic development and workforce needs.”

The Area of Programmatic Strategic Emphasis impacted by this new major is No. 2 Economic Development: Regional Workforce Demand, as the BOG study showed the gap between expected graduates in this field and the numbers needed to fill the workforce demands. Additionally, this program is needed to enable current advertising employees to get caught up on the changing nature of their digital field and enable them to properly use metrics, analytics and other data tools that were not available to them early in their careers or in their undergraduate education.

This new degree program will attract both newly graduated students and professionals. Advertising has seen significant advancement in terms of the ability to target and track advertisements and gauge their impacts empirically. These changes have been so rapid, however, that traditional mass communications schools/colleges have struggled to keep pace. This new program addresses the needs at the graduate level for both those desiring to enter the field and those currently in the workforce but in need of upgrading their knowledge and skills.

This degree specifically addresses Programs of Strategic Emphasis in terms of the current category of Economic Development (regional workforce demand) and the proposed category of Critical Workforce - Gap Analysis. The Advertising degree is designed to prepare students with the skills necessary to fulfill the needs of a critically under-supplied labor market, according to the Higher Education Access and Educational Attainment Commission’s gap analysis examining labor projections versus related degree production. The degree is designed to produce highly qualified marketing and management-trained graduates and elevate the careers of existing professionals. Program graduates will be able to fill Tampa Bay regional and statewide demand for entry- and mid-level advertising positions, such as marketing research analysts, marketing managers, advertising and promotion managers, public relations managers, graphic designers, and advertising sales agents.

F. Identify any established or planned educational sites at which the program is expected to be offered and indicate whether it will be offered only at sites other than the main campus.

The M.S. in Advertising will be offered only at the University of South Florida in Tampa.

INSTITUTIONAL AND STATE LEVEL ACCOUNTABILITY

II. Need and Demand

- A. Need: Describe national, state, and/or local data that support the need for more people to be prepared in this program at this level. Reference national, state, and/or local plans or reports that support the need for this program and requests for the proposed program which have emanated from a perceived need by agencies or industries in your service area. Cite any specific need for research and service that the program would fulfill.**

Both the Florida Department of Economic Opportunity and the U. S. Department of Labor projections indicate an increasing need for university graduates with skills in using data analytics for media planning

and implementation in both the Tampa Bay region and in Florida.

State of Florida projections for Workforce Region 14 (Pinellas County) and Workforce Region 15 (Hillsborough County) from 2016 – 2024 show the intense need to provide this degree. Many present mass communications industries in “legacy” fields show strong projected employment declines. The State of Florida indicates projected 15.1% (Pinellas) and 8.4% (Hillsborough) decreases in the need for employees in the “publishing industries,” 6.6% (Pinellas) and 6.5% (Hillsborough) decreases in content distribution employees working at ISPs, and Web Search Portals, and a mere 3.8% (Pinellas) and 1.2% (Hillsborough) increase in employees working in Broadcasting.

Professionals in advertising and strategic communications fields, however, show strong growth. State of Florida projections Workforce Region 15 (Hillsborough) indicate a 12%-20% increase for advertising, public relations, and management analysts, and those positions that require data analysis and the use of data for planning for advertising, public relations, and professional communications. Likewise, U. S. Department of Labor projections (https://www.bls.gov/emp/ep_table_102.htm) indicate a 6.5% increase in media and management jobs that require data analysis and media planning and execution. This is precisely the work force that this graduate degree aims to produce. Importantly, the degree program was shaped with input from, and years of engagement with, the Tampa Bay advertising industry.

Analysis of U.S. Bureau of Labor Statistics further shows a large deficit in the number of students trained in the State of Florida for management positions in Advertising, Promotions, and Marketing. Although numerous programs exist in the state to train students for traditional entry-level roles in advertising, almost none trains students specifically for roles as leaders in the evolving digital media landscape. This is reflected in the critical workforce need, which is projected at double-digit growth in Florida until 2024. Anticipated need numbers greater than 8,200 in the state in this timespan. Double-digit growth is also projected nationally through 2024.

B. Demand: Describe data that support the assumption that students will enroll in the proposed program. Include descriptions of surveys or other communications with prospective students.

Multiple quantitative surveys of student populations at USF and the Zimmerman School suggest strong demand for the proposed program, which will draw both bachelor degree graduates in advertising (mass communications) and marketing (business).

In a 2015 survey of students across colleges at USF, 59% reported being interested in graduate school. Of those, 46% wanted experience tailored toward their profession, and 45% wanted to increase their salary potential. In a survey of USF marketing and advertising students, 27.4% of students were interested in a master's degree with the specific learning outcomes associated with this degree, and 11.1% began thinking about graduate school in high school. With 295 marketing majors, 185 advertising majors and pre-majors, and 229 public relations majors and pre-majors (total 709), the survey data suggest a pool of approximately 194 students with an interest in this degree on the Tampa campus alone, well above the program size.

Additionally, advertising undergraduates in the Zimmerman School (historically approximately 200 each year) would be eligible to pursue this degree, as well. Presently, their only options are a general Mass Communications (09.0102) Master of Arts degree with concentrations in either Media Studies or Strategic Communications.

- C. If substantially similar programs (generally at the four-digit CIP Code or 60 % similar in core courses), either private or public exist in the state, identify the institution(s) and geographic location(s). Summarize the outcome(s) of communication with such programs with regard to the potential impact on their enrollment and opportunities for possible collaboration (instruction and research). In Appendix C, provide data that support the need for an additional program.**

The proposed M.S. degree targets needs that are currently underserved within the State of Florida, according to the BOG's current Programs of Strategic Emphasis list, where 09.0900 is designated as Gap Analysis. Two SUS institutions offer master's degrees in this CIP: Florida State University in Tallahassee, which offers an Integrated Marketing Communication M.S. and the University of North Florida in Jacksonville, which offers this degree as Communication Management.

Given that this CIP code has been identified as a critical workforce area of strategic emphasis by the BOG, it is clear that the State University System is not meeting this need.

- D. Use Table 1 in Appendix A (1-A for undergraduate and 1-B for graduate) to categorize projected student headcount (HC) and Full Time Equivalent (FTE) according to primary sources. Generally undergraduate FTE will be calculated as 30 credit hours per year and graduate FTE will be calculated as 24 credit hours per year. Describe the rationale underlying enrollment projections. If students within the institution are expected to change majors to enroll in the proposed program at its inception, describe the shifts from disciplines that will likely occur.**

Table 1-B is calculated assuming the number of full-time graduate students taking a full load of 18 credit hours per year, and then divided by the graduate FTE rate of 24 as defined above.

The proposed degree program will primarily draw students who graduate from USF and other Florida institutions with bachelor degrees in advertising, public relations, mass communications, or related fields. We based our enrollment projections on three main factors: First, a small percentage of the nearly 200 advertising undergraduates presently in the School will go on to the master's degree, which would produce 5 students even if only 2.5% of graduates chose to go on to graduate school; Second, a larger percentage of students in the School's interdisciplinary Zimmerman Advertising Program have already expressed their interest in this new graduate degree, giving us an estimated 17-20 enrollees annually; and Third, other USF and Florida graduates from related programs (marketing, informatics, media studies) who desire to be in a major metropolitan media market and require an advanced degree for career advancement. The three targeted enrollee categories would provide a strong recruiting pool.

- E. Indicate what steps will be taken to achieve a diverse student body in this program. If the proposed program substantially duplicates a program at FAMU or FIU, provide, (in consultation with the affected university), an analysis of how the program might have an impact upon that university's ability to attract students of races different from that which is predominant on their campus in the subject program. The university's Equal Opportunity Officer shall review this section of the proposal and then sign and date Appendix B to indicate that the analysis required by this subsection has been completed.**

Table A. Comparison of Ethnicity among USF Colleges and Florida Residents

	Arts & Sciences		Social & Behavioral Sci.		Business		Education		Florida Residents 2010
White	8001	48%	1449	57%	2728	46%	1372	61%	62%
Black	1843	11%	320	13%	461	8%	253	11%	15%
Asian	1250	7%	60	2%	328	5%	51	2%	>3%
Hispanic	3416	20%	497	20%	1000	17%	327	14%	20%

Table B. Ethnicity in Current Mass Communications Graduate Major in comparison to Arts and Sciences and Florida populations

Ethnicity	Arts & Sciences		Current Mass Communications graduate students		Florida Residents 2010
White	8001	47%	12	24%	62%
Black	1843	12%	4	8%	15%
Asian	1250	8%	0	0%	>3%
Hispanic	3416	20%	2	4%	20%
Non-Resident Alien and Other	2157	13%	32	64%	

*Data obtained from USF Infocenter Fall 2017 Preliminary count.

Step 1: A sample baseline of ethnicity of the major colleges at USF is shown in the above Table A. Table B demonstrates the ethnicity of the student population in our program as of Fall 2017. The mass communications major attracts strong interest from international students. However, as in many of the mass communications and related industry fields, diversity is an ongoing issue. Our current graduate student population (excluding Non-Resident Alien students) is 10% black and 10% Hispanic, both lower than comparable percentages in the state population and in the College of Arts and Sciences.

Step 2: The importance of a diverse faculty, staff and student body is valued. Active participation in recruiting consistent with "One Florida" is done and the recruitment guidelines of the College of Arts and Sciences are followed. Representatives administering the M.S. in Advertising degree will participate in extensive recruiting and awareness for the degree. Recruitment materials produced to support such efforts will highlight the faculty and students at USF and in the Zimmerman School.

Efforts to increase recruitment of underrepresented groups will include multiple on-campus information sessions and targeted mailings throughout the academic year for current undergraduates in mass communications, especially targeting high-performing students. The Zimmerman School is assigned two full-time undergraduate advisors who will help identify potential applicants (e.g., students who meet the grade point average requirement). The Graduate Director and Academic Program Specialist will make personal contact with underrepresented students identified through this process in order to personalize the recruitment process with a consultation session. In addition, the Graduate Director has been and will continue to network with undergraduate directors at potential feeder programs, such as Florida International University, which has an undergraduate advertising-focused major. The graduate program also offers teaching assistantships to qualified applicants, which can be used to encourage underrepresented students to apply.

Step 3: The Director of this program will work with the Office of Admissions in identifying undergraduate programs beyond Florida in the Southeast and Northeast with high numbers of underrepresented minority students. The Zimmerman School can then reach out to update those graduating students on the existence of this new graduate degree to encourage participation. Additionally, the School has a shared recruiter with the Muma College of Business who will include graduate diversity recruiting into his/her responsibilities.

Step 4: It is anticipated that graduates of this program will become our best recruiters of underrepresented students.

III. Budget

- A. Use Table 2 in Appendix A to display projected costs and associated funding sources for Year 1 and Year 5 of program operation. Use Table 3 in Appendix A to show how existing Education & General funds will be shifted to support the new program in Year 1. In narrative form, summarize the contents of both tables, identifying the source of both current and new resources to be devoted to the proposed program. (Data for Year 1 and Year 5 reflect snapshots in time rather than cumulative costs.)**

Table 2 shows the projected costs for the new program. We are able to meet instructional staffing needs for the new degree because it is focused narrowly on advertising and marketing. Existing, qualified faculty are in place, except for the ongoing search for a new director and a vacant endowed professorship, which will also be filled. Therefore, we project no new faculty needed. Table 4 shows the projected faculty participation.

Additionally, a few of the courses that serve this degree also serve our M.A. in Mass Communications, and adding students to those existing sections would involve minimal redistribution of current graduate faculty teaching loads. Staff needs likewise are minimal, as the new program would dovetail into a workload effort that already exists for the current M.A. in Mass Communications. We show small reallocations of two staff members' workload to service this new major.

Per FTE costs are in line with state BOG averages.

- B. Please explain whether the university intends to operate the program through continuing education, seek approval for market tuition rate, or establish a differentiated graduate-level tuition. Provide a rationale for doing so and a timeline for seeking Board of Governors' approval, if appropriate. Please include the expected rate of tuition that the university plans to charge for this program and use this amount when calculating cost entries in Table 2.**

Not applicable.

- C. If other programs will be impacted by a reallocation of resources for the proposed program, identify the impacted programs and provide a justification for reallocating resources. Specifically address the potential negative impacts that implementation of the proposed program will have on related undergraduate programs (i.e., shift in faculty effort, reallocation of instructional resources, reduced enrollment rates, greater use of adjunct faculty and teaching assistants). Explain what steps will be taken to mitigate any such impacts. Also, discuss the potential positive impacts that the proposed program might have on related undergraduate programs (i.e., increased undergraduate research opportunities, improved quality of instruction associated with cutting-edge research, improved labs and library resources).**

As this master's degree program grows, it will allow students from other majors or universities to prepare for managerial roles in marketing, promotions, advertising, graphic design, and public relations. Students in this program will be able to take elective classes in marketing and in a number of other CAS departments (e.g., English, Information Studies, and Psychology). It will also allow our junior and senior advertising faculty to have access to research assistants and graduate students well-versed in their fields of study, providing stronger and more relevant research to industry and the academic field.

- D. Describe other potential impacts on related programs or departments (e.g., increased need for general education or common prerequisite courses, or increased need for required or elective courses outside of the proposed major).**

As it is a collaborative degree program with the USF Muma College of Business, the School has already conferred with Muma administrators to ensure that additional M.S. in Advertising students can be accommodated by current Muma graduate faculty staffing for the three marketing courses required in the curriculum. See Appendix B for its concurrence with this proposal.

- E. Describe what steps have been taken to obtain information regarding resources (financial and in-kind) available outside the institution (businesses, industrial organizations, governmental entities, etc.). Describe the external resources that appear to be available to support the proposed program.**

External resources that are available to this degree program include industry guidance and internships from the sixth largest advertising agency in the U.S. and the third largest advertising agency in the world, among many others in the regional market.

IV. Projected Benefit of the Program to the University, Local Community, and State

Use information from Tables 1 and 2 in Appendix A, and the supporting narrative for “Need and Demand” to prepare a concise statement that describes the projected benefit to the university, local community, and the state if the program is implemented. The projected benefits can be both quantitative and qualitative in nature, but there needs to be a clear distinction made between the two in the narrative.

Students trained in this major will be able to fulfill demand in Tampa Bay and the State of Florida for professionals who can use an integrated, analytic approach to public relations, advertising and strategic communications. From a quantitative standpoint, the Board of Governors has identified this major as being on its Gap Analysis list, meaning that there is a projected gap between the positions that will be open in the state and the number of qualified graduates who can fill them. In qualitative terms, faculty hear from our professional partners in the regional community of the need for students to have a broader range of communications skills, for integrated approaches to strategic messaging and media and for greater digital/analytical skills.

V. Access and Articulation – Bachelor’s Degrees Only

- A. If the total number of credit hours to earn a degree exceeds 120, provide a justification for an exception to the policy of a 120 maximum and submit a separate request to the Board of Governors for an exception along with notification of the program’s approval. (See criteria in Board of Governors Regulation 6C-8.014)**

Not applicable for master’s level degree.

- B. List program prerequisites and provide assurance that they are the same as the approved common prerequisites for other such degree programs within the SUS (see link to the Common Prerequisite Manual on [the resource page for new program proposal](#)). The courses in the Common Prerequisite Counseling Manual are intended to be those that are required of both native and transfer students prior to entrance to the major program, not simply lower-level courses that are required prior to graduation. The common prerequisites and substitute courses are mandatory for all institution programs listed, and must be approved by the Articulation Coordinating Committee (ACC). This requirement includes those programs designated as “limited access.”**

If the proposed prerequisites are not listed in the Manual, provide a rationale for a request

for exception to the policy of common prerequisites. **NOTE:** Typically, all lower-division courses required for admission into the major will be considered prerequisites. The curriculum can require lower-division courses that are not prerequisites for admission into the major, as long as those courses are built into the curriculum for the upper-level 60 credit hours. If there are already common prerequisites for other degree programs with the same proposed CIP, every effort must be made to utilize the previously approved prerequisites instead of recommending an additional "track" of prerequisites for that CIP. Additional tracks may not be approved by the ACC, thereby holding up the full approval of the degree program. Programs will not be entered into the State University System Inventory until any exceptions to the approved common prerequisites are approved by the ACC.

Not applicable for master's level degree.

- C. If the university intends to seek formal Limited Access status for the proposed program, provide a rationale that includes an analysis of diversity issues with respect to such a designation. Explain how the university will ensure that Florida College System transfer students are not disadvantaged by the Limited Access status. **NOTE:** The policy and criteria for Limited Access are identified in Board of Governors Regulation 6C-8.013. Submit the Limited Access Program Request form along with this document.

Not applicable for master's level degree.

- D. If the proposed program is an AS-to-BS capstone, ensure that it adheres to the guidelines approved by the Articulation Coordinating Committee for such programs, as set forth in Rule 6A-10.024 (see link to the Statewide Articulation Manual on [the resource page for new program proposal](#)). List the prerequisites, if any, including the specific AS degrees which may transfer into the program.

Not applicable for master's level degree.

INSTITUTIONAL READINESS

VI. Related Institutional Mission and Strength

- A. Describe how the goals of the proposed program relate to the institutional mission statement as contained in the SUS Strategic Plan and the University Strategic Plan (see link to the SUS Strategic Plan on [the resource page for new program proposal](#)).

The intention of this proposal is to restructure and transform the current USF Zimmerman School of Advertising and Mass Communications' curriculum in a manner that is consistent with USF Tampa and SUS-BOG Strategic Plans and student and workforce demand.

The proposed CIP will help meet USF Tampa's goals of preparing global citizens via the study of global digital advertising systems (Goal 1), preparing students and focusing faculty on innovating in the integration of advertising and analytics (Goal 2), and increasing partnerships on and off campus to foster a stronger economy as the result of producing needed workers and innovative strategic communications solutions (Goal 3).

The proposed CIP also supports the SUS's 2025 Strategic Plan (revised Nov. 6, 2014), first and foremost because it is on the Programs of Strategic Emphasis list (effective Fall 2014) in the category of GAP Analysis. We also believe the new graduate CIP would further the SUS's nine general strategic goals in the following areas:

- Increase the Number of Degrees Awarded within Programs of Strategic Emphasis: The School

presently does not offer a degree (CIP) in an area of strategic emphasis at the graduate level, and by creating the new degree, we would increase the number of degrees awarded at USF.

- **Strengthen Quality & Reputation of Academic Programs and Universities:** The School's advertising program is already widely known, thanks to exposure from its specialty Zimmerman Advertising Program. This new degree would provide additional quality for the program and improve the School's and USF's reputation by hosting the only master's in advertising in a major metropolitan market in Florida.
- **Strengthen Quality & Reputation of Scholarship, Research, and Innovation:** Advertising scholarly research is one of the strongest fields in mass communications, with social science research that is grant-able. By adding graduate students who are studying advertising alone, we give more resources to faculty and graduate research opportunities to lift the field and the quality of the School's undergraduate offerings.
- **Increase Community and Business Engagement:** We presently place more than 150 interns a year with West Central Florida businesses, and having advertising graduate students with higher skill levels available for partnerships and internships, we can increase the number and quality of those partnerships in this field.

Specifically this proposal recognizes that persuasive communication has evolved from rather traditional media and tactics based primarily upon the written word into a heavily strategic and technological enterprise where all messaging elements are integrated from the earliest planning. The resulting tactics deliver a measurable return on marketing investment for the client. Further, while mass communications graduates previously needed know how to write narratives as their top skill, today's graduates must simultaneously use new technology to implement the content across multiple platforms and create prose that is pleasing to both the human reader and the algorithms of search engines. Offering this M.S. degree will enhance student employment prospects by giving graduates more and better digital tools and skills. It will better serve industry partners in the Tampa Bay region and state by providing interns and entry-level employees with enhanced training. It will enhance faculty research in audience analytic skills by providing motivated research assistants. Presently, the general M.A. in Mass Communications (with concentrations in media studies and strategic communications) does not address or extend the School's advertising expertise in the manner in which this new M.S. degree will.

B. Describe how the proposed program specifically relates to existing institutional strengths, such as programs of emphasis, other academic programs, and/or institutes and centers.

The M.S. in Advertising degree leverages existing strengths in an undergraduate major in the Zimmerman School of Advertising and Mass Communications, as well as those students in the interdisciplinary Zimmerman Advertising Program. Advertising has been an emphasis and focus of the School for nearly a decade. Similarly, the Tampa Bay metropolitan area is rich with graduates of the program's concentrations and provides professional guidance and teaching for our students. As the nation's 11th largest media market boasting national corporate headquarters (Home Shopping Network, Nielsen) and major league franchises in the NFL, NHL, MLB and other smaller sports, Tampa Bay is full of opportunities for partnerships and internships for students in advertising.

C. Provide a narrative of the planning process leading up to submission of this proposal. Include a chronology in table format of the activities, listing both university personnel directly involved and external individuals who participated in planning. Provide a timetable of events necessary for the implementation of the proposed program.

In 2013, as the Zimmerman School was being examined for voluntary re-accreditation, the CAS Dean moved the School in a more digital, modern direction and let accreditation lapse for that reason (the accrediting body had restrictions that would make it difficult to fully modernize the curriculum). In 2013-

14, faculty discussed the best way to proceed before identifying two new majors that integrated strengths already in the School and sought undergraduate CIPs that were on the Board of Governor's Programs of Strategic Emphasis list. At the same time, the Zimmerman Advertising Program (ZAP) was formalized as an interdisciplinary program between the Muma College of Business and the College of Arts and Sciences. This proposal for an advertising master's degree grew out of the creation of ZAP and movement at the undergraduate level to increasingly put School resources into becoming more pre-eminent in advertising education.

Planning Process

Date	Participants	Planning Activity
Spring 2013	CAS Dean Eric Eisenberg and interim director, various faculty	CAS Dean calls for updating curriculum toward a more integrated, broader approach that emphasizes analytics and digital media
Fall 2013-Spring 2014	Dr. Kelly Page Werder, faculty	New course proposals submitted and approved for two courses that are core in the proposed degree
2015	Interim Director Sam Bradley, Associate Director Wayne Garcia and various faculty	A pre-proposal for this new major is started, in conjunction with PR and advertising faculty
2015	CAS Associate Dean Potter, Dean Eisenberg, Graduate Council, Zimmerman School Faculty	Pre-proposal is approved by faculty, CAS Dean, college graduate committee
2016.1.22	Faculty curricular review, Drs. Bradley and Ramirez	Proposal document developed
2016.3.7	USF curricular review committees, Drs. Bradley and Ramirez	Approval by full Graduate Council with revisions requested by Grad Council Curriculum Committee
2016.3.8	USF curricular review committees, Drs. Bradley and Ramirez	Revised proposal cleared through OGS, submitted to OIE for APAC
2016.3.22	USF curricular review committees, Drs. Bradley and Ramirez	APAC Approved with minor revision
2016.3.28	USF curricular review committees, Drs. Bradley and Ramirez	Updated copy with APAC Revisions posted for CAVP
April 2016	USF curricular review committees, Drs. Bradley and Ramirez	Successful review by CAVP and placed on BOT work plan
Summer 2016	Zimmerman graduate faculty led by Director	Writing new course proposals
June 2016	Dr. Ramirez, Mr. Garcia	New elective course in Return on Investment is proposed, approved by Graduate Council
October 2016	Zimmerman School Graduate Committee and faculty	Finalize 09.0900 M.S. Proposal, approval by faculty, and filed for University review
2017.1.9	Dr. Ramirez, Mr. Garcia and	Proposal reviewed by Graduate

	Graduate Council	Council
2017.1.23	Dr. Ramirez, Mr. Garcia and Graduate Council	Proposal reviewed and held for further revisions by Graduate Council
2017.8.23	Dr. Ramirez, Dr. Potter, Mr. Garcia	Resubmitted for clearance for Graduate Council review
2017.10.16	Dr. Potter, Mr. Garcia	Approved by Graduate Council

Events Leading to Implementation

Date	Implementation Activity
September 2016	Zimmerman School faculty approval of New Advertising master's degree and accompanying new course proposals
September 2016	Review by CAS graduate curriculum committees
Fall 2016-Fall 2107	Review and/or approvals by USF, BOT and BOG curricular bodies
Fall 2018	New Advertising master's degree is implemented and listed in the graduate catalog

VII. Program Quality Indicators - Reviews and Accreditation

Identify program reviews, accreditation visits, or internal reviews for any university degree programs related to the proposed program, especially any within the same academic unit. List all recommendations and summarize the institution's progress in implementing the recommendations.

The Zimmerman School graduate and undergraduate programs were reviewed in 2016 as part of USF Tampa's academic program review process. The recommendations regarding the graduate program were: pursue a new Master's in Advertising degree; consider a clear program focus for existing master's degree concentrations; hire two new "impact" faculty members; and hire a strong, new director.

This proposal addresses the first of those recommendations. The focus of the remainder of the graduate program is under review by faculty. A search firm has been retained to assist in hiring a new director, who will have the latitude and funding to hire the two recommended "impact" tenure-line faculty members.

VIII. Curriculum

A. Describe the specific expected student learning outcomes associated with the proposed program. If a bachelor's degree program, include a web link to the Academic Learning Compact or include the document itself as an appendix.

The specific learning outcomes associated with this proposal are in-line with the nature of the industry and the requirements of the State of Florida. The proposed curriculum has been mapped across the learning outcomes outlined below.

Upon completion of the degree, graduates should be able to:

- Apply mass communication and persuasion theory to predict the effectiveness of advertising techniques.
- Interpret secondary research and develop primary research for strategy development and outcome evaluation.
- Synthesize market data about advertising.
- Compute return on investment for advertising campaigns.

- Plan advertising campaigns that maximize return on advertising investment.
- Modify advertising communication tactics for different cultural applications in the global marketplace.
- Analyze competing solutions to advertising communication problems for potential effectiveness.
- Apply leadership principles to management situations in advertising.
- Defend planned tactics for advertising campaigns.
- Analyze a company or organization's communications efforts for strengths and weaknesses.
- Identify advertising communication opportunities in an evolving marketplace.
- Devise entrepreneurial solutions to advertising.
- Analyze marketing situations and develop strategic plans toward bettering those situations.
- Analyze audiences and generate media strategies to reach those audiences.
- Evaluate concurrent activities of major constituents (i.e., account management, media, creative, and client) in the advertising process.
- Develop and evaluate social media marketing initiatives within the context of a 360° campaign.
- Understand the role of both paid and earned social media initiatives.
- Create a finished advertising campaign given only a client and preliminary goals.

B. Describe the admission standards and graduation requirements for the program.

Admission Requirements for M.S.

Must meet University requirements (see Graduate Admissions) as well as requirements for the major listed below.

- a 3.00 upper division GPA
- 153V (60%), 144Q (18%) preferred on the GRE
- a resume
- three letters of recommendation (academic recommendations preferred)
- a strong letter of intent
- an appropriate bachelor's degree from a regionally accredited institution (e.g., Mass Communications, Communication, Marketing)
- Students who lack an appropriate background in the major may be required to take additional courses to meet major minimums (e.g., Quantitative Methods).

C. Describe the curricular framework for the proposed program, including number of credit hours and composition of required core courses, restricted electives, unrestricted electives, thesis requirements, and dissertation requirements. Identify the total numbers of semester credit hours for the degree.

Total Minimum Hours: 36

Core Requirements 24 hours

MMC 6447 Quantitative Research Methods 3
 ADV 5825 Advertising Proseminar 3
 ADV 6602 Advanced Advertising Management 3
 ADV 6505 Advertising Research 3
 MMC 6449 Advertising Analytics 3
 ADV 5508 Return on Advertising Investment 3
 ADV 5005 Advertising Planning 3
 ADV 6305 Advertising Media Strategies 3

Applied Research 6 hours

MMC 6950 Applied Research Project 6

Required Marketing Courses 6 hours

MAR 6815 - Marketing Management 3
 MAR 6555 - Consumer Behavior Insights 3

Requires completion of an Applied Research Project in lieu of a comprehensive exam (no thesis)**D. Provide a sequenced course of study for all majors, concentrations, or areas of emphasis within the proposed program.****Fall Semester - Year One**

ADV 5825	Advertising Proseminar	3
ADV 6505	Advertising Research	3
MMC 6449	Advertising Analytics	3
		9

Spring Semester - Year One

MMC 6447	Quantitative Research Methods* or Elective Grad-level Marketing Course	3
ADV 5005	Advertising Planning Required Grad-level Marketing Course	3
		9

Fall Semester - Year Two

ADV 6602	Advanced Advertising Management Required Grad-level Marketing Course	3
MMC 6950	Applied Research Project	3
		9

Spring Semester - Year Two

ADV 5508	Return on Advertising Investment	3
ADV 6305	Advertising Media Strategies	3
MMC 6950	Applied Research Project**	3
		9

36 credits total**Required Marketing Courses**

MAR 6815 - Marketing Management

MAR 6555 - Consumer Behavior Insights

Marketing Elective Course (select one of the following if MMC 6447 has already been satisfied prior to admission):

MAR 6336 - Promotional Management

MAR 6646 - Research for Marketing Managers

MAR 6735 – Digital Marketing

**Student may petition to replace this course with MAR 6815 (Marketing Management) if the student has taken and passed two approved methods courses with at least a grade of B.*

***Student may petition the Zimmerman School for permission to complete a practicum for MMC 6950.*

E. Provide a one- or two-sentence description of each required or elective course.

ADV 5005 Advertising Planning (3) Introduction to the process of developing advertising strategy, emphasizing theory and research methods. Applied research course to bridge research methods with execution of creative messaging strategies that drive business success.

ADV 5825 Advertising Proseminar (3) The primary objective of this proseminar course is to provide students with the fundamentals of advertising theory and research practices. It will challenge students with a critical and philosophical exploration of the ideas of mass communications and advertising. Students will learn the basic concepts of advertising, public relations, promotion, branding, and direct marketing and their applications for integrated marketing campaigns.

ADV 5508 Return on Advertising Investment (3) An in-depth analysis of the performance metrics required to determine the success of advertising and marketing in fiscally accountable business practice. Metrics will include both quantitative and qualitative measures of advertising planning, consumer research, campaign strategy and media.

ADV 6305 Advertising Media Strategies (3) Advertising Media Strategies is designed to provide students with advanced knowledge of brand media strategy development across traditional, digital, and social media. Students will become acquainted with the practices, tools, and theory of media planning, media relations, and how they fit into the marketing process.

ADV 6505 Advertising Research (3) This course is designed to teach normal campaign research through various methods, including: copy testing, survey content development, sample frame development, consumer insights, brand triggers, and purchase intent. An important distinction to be made in advertising research is the use of primary versus secondary data. As such, this course will cover various methods for collecting and analyzing data organically, as well as how to interpret already-existing data (e.g. Simmons, Nielsen, ratings, shares, industry reports, etc.) and apply this information effectively and strategically.

ADV 6602 Advanced Advertising Management (3) Focuses on application of management principles and practice to create effective development of advertising plans. The course includes case studies and discussion of current problems in research, planning, operations, administration, and evaluation.

MAR 6815 Marketing Management (3) Analysis of operational and strategic planning problems confronting marketing managers. Topics include buyer behavior, market segmentation, information systems, product selection and development, pricing, distribution, promotion, and sales force management.

MAR 6555 Consumer Behavior Insights (3) Students will gain insight into customers' latent needs up to and including post-consumption experiences. Topics include coverage of underlying psychological processes and an overview of relevant research tool(s) that could be applied to gain insights.

MAR 6336 Promotional Management (3) Management of the promotional function as part of the total marketing program. Includes a study of relevant buyer behavior concepts, resources and budgets, media, creative aspects, and effectiveness measurements as they relate to the management tasks of developing, implementing, and evaluating promotional strategy.

MAR 6646 Research for Marketing Managers (3) A study of marketing research methods and information systems and their relationship to marketing decision-making. Topics include value and cost of information, sample design, questionnaire design, statistical analysis, and report presentation. Lecture, reading, case analysis, and project.

MAR 6735 Digital Marketing (3) This course focuses on applied digital marketing concepts and strategies taught primarily by a team of corporate practitioners, who will familiarize students with a broad framework of digital marketing including innovation & analytics.

MMC 6449 Advertising Analytics (3) Advertising Analytics addresses how to use data analytics to develop, optimize, and assess outcomes of advertising strategies for brands. In this course, students will learn the scientific approach to marketing with hands-on use of technologies such as databases, analytics and computing systems to collect, analyze, and act on customer information.

MMC 6447 Quantitative Research Methods (3) Examination of the process and techniques involved in quantitative data collection and analysis for mass communication purposes.

MMC 6950 Applied Research Project (3) Completion of a major applied communication research project under supervision. Topic will be selected according to student's needs and interests.

- F. For degree programs in the science and technology disciplines, discuss how industry-driven competencies were identified and incorporated into the curriculum and indicate whether any industry advisory council exists to provide input for curriculum development and student assessment.**

The M.S. in Advertising is an information- and technology-based discipline as opposed to traditional B.A. and M.A. advertising programs with an emphasis on “creativity,” or ad creation. Input for this proposal was provided by members of Tampa Bay area advertising organizations, including the American Advertising Federation and Ad2 (its age-32-and-under organization).

- G. For all programs, list the specialized accreditation agencies and learned societies that would be concerned with the proposed program. Will the university seek accreditation for the program if it is available? If not, why? Provide a brief timeline for seeking accreditation, if appropriate.**

The primary professional accrediting body for this program would be the Accrediting Council on Education in Journalism and Mass Communications (ACEJMC). Current Zimmerman School graduate programs have not sought ACEJMC accreditation. The Zimmerman School withdrew from undergraduate ACEJMC accreditation in 2013 to make curricular changes that would have been impermissible under ACEJMC’s older, legacy model of mass communications education. This follows a trend of the leading programs of mass communications voluntarily withdrawing from ACEJMC (e.g., The Ohio State University, University of Texas at Austin, and University of Wisconsin at Madison). As ACEJMC updates its criteria to better reflect that modern media environment and changes in media education in a large research university, the members of the school faculty have expressed that they would be open to exploring rejoining that body. At this time, accreditation will not be sought, in part, because advertising-focused agencies do not offer accreditation and, in part, because those agencies that do offer accreditation do not focus on interdisciplinary and collaborative programs that cross the boundaries. The issue of accreditation in the advertising field is expected to be revisited by the yet-to-be-hired director of the School.

- H. For doctoral programs, list the accreditation agencies and learned societies that would be concerned with corresponding bachelor’s or master’s programs associated with the proposed program. Are the programs accredited? If not, why?**

Not applicable.

- I. Briefly describe the anticipated delivery system for the proposed program (e.g., traditional delivery on main campus; traditional delivery at branch campuses or centers; or nontraditional delivery such as distance or distributed learning, self-paced instruction, or external degree programs). If the proposed delivery system will require specialized services or greater than normal financial support, include projected costs in Table 2 in Appendix A. Provide a narrative describing the feasibility of delivering the proposed program through collaboration with other universities, both public and private. Cite specific queries made of other institutions with respect to shared courses, distance/distributed learning technologies, and joint-use facilities for research or internships.**

The M.S. in Advertising will begin as a traditional M.S. degree program on the USF Tampa campus.

IX. Faculty Participation

- A. Use Table 4 in Appendix A to identify existing and anticipated full-time (not visiting or adjunct) faculty who will participate in the proposed program through Year 5. Include (a) faculty code associated with the source of funding for the position; (b) name; (c) highest degree held; (d) academic discipline or specialization; (e) contract status (tenure, tenure-**

earning, or multi-year annual [MYA]); (f) contract length in months; and (g) percent of annual effort that will be directed toward the proposed program (instruction, advising, supervising internships and practica, and supervising thesis or dissertation hours).

See Appendix A.

- B. Use Table 2 in Appendix A to display the costs and associated funding resources for existing and anticipated full-time faculty (as identified in Table 4 in Appendix A). Costs for visiting and adjunct faculty should be included in the category of Other Personnel Services (OPS). Provide a narrative summarizing projected costs and funding sources.**

Staffing will include a new Director, a new hire Zimmerman Advertising Endowed Professor and eight tenured, tenure-track faculty members. Academic advising is provided primarily by the School's Academic Program Specialist, with assistance from the graduate faculty and graduate director. Overall the delivery of the program in terms of cost per FTE is highly efficient. The School hired two tenure-track faculty in the past three years to serve the current graduate program and this new M.S. degree.

- C. Provide in the appendices the abbreviated curriculum vitae (CV) for each existing faculty member (do not include information for visiting or adjunct faculty).**

See Appendix D.

- D. Provide evidence that the academic unit(s) associated with this new degree have been productive in teaching, research, and service. Such evidence may include trends over time for average course load, FTE productivity, student HC in major or service courses, degrees granted, external funding attracted, as well as qualitative indicators of excellence.**

The USF Zimmerman School of Advertising and Mass Communications has a proven track record of recruitment, retention, and graduation at the bachelor's and master's levels. Currently offering the B.A. in Mass Communications with six concentrations, the Zimmerman School has averaged an unduplicated headcount of 1,186 students and conferred an average of 254 baccalaureate degrees annually across the past six academic years. More than 200 of our students participate in for credit internships annually, and the school had more students study abroad than any other program at USF in 2014. Our graduates form the leadership of Tampa Bay media-related professional societies, such as the American Advertising Federation's Ad 2 Tampa Bay. The school also has been well below targets for percentage of students graduating with excess hours.

The Zimmerman School has greatly increased the research productivity of its faculty within the past three academic years and was awarded its first-ever federal grant in 2015. Our faculty publish in, edit, and serve on the editorial boards of the top-ranked peer-reviewed journals in mass communications. One faculty member was recently awarded a prestigious American Political Science Association Congressional Fellowship in 2015 that sent him to Washington, D.C., for nine months to work hand-in-hand with members in congress to develop media law and policy.

School faculty teaching accounts for between 50% and 90% of their assigned workload effort each semester. Most faculty members are assigned at least 5% of their workload to provide service within the university, professional community, or both. Faculty members use service time to serve on a variety of committees throughout the university, act as journal editors and journal editorial board members, participate in national professional organizations, and serve as liaisons between students and the Florida professional media industry. All Zimmerman School faculty members participate in these activities. The Zimmerman School has 24 full-time faculty, including 11 instructors.

X. Non-Faculty Resources

- A. Describe library resources currently available to implement and/or sustain the proposed program through Year 5. Provide the total number of volumes and serials available in this discipline and related fields. List major journals that are available to the university's students. Include a signed statement from the Library Director that this subsection and subsection B have been reviewed and approved.**

The USF Library at Tampa has access to numerous databases and e-journals of top advertising, public relations, marketing, mass communications and other communications-related journal and periodicals; additional databases include Web of Knowledge, Web of Science PsycINFO, Business Source Premier, Communications Studies, etc. Current advertising and public relations students and faculty members have access to a total of 700 volumes and serials through the USF Libraries system, online or in print copies.

- Please see Appendix C for full analysis of library resources.

- B. Describe additional library resources that are needed to implement and/or sustain the program through Year 5. Include projected costs of additional library resources in Table 2 in Appendix A. Please include the signature of the Library Director in Appendix B.**

We do not anticipate a need for additional allocation of resources at this time. Significant research and instructional resources at the Library are already devoted to the undergraduate degrees in this area, as well as current faculty research.

- C. Describe classroom, teaching laboratory, research laboratory, office, and other types of space that are necessary and currently available to implement the proposed program through Year 5.**

The Zimmerman School of Advertising and Mass Communications Social Media and Opinion Laboratory was completed in the Summer of 2016 in its Clendinen Library space. This social media "war room," located in CIS 3092, was designed to emulate state-of-the-art digital media creation, distribution, data mining, and real-time data analysis. Sixteen computer workstations, and a six-panel large screen video display allow researchers and graduate students to use contemporary media analytic tools for use in coursework and research in the new master's degree.

In addition, the School has two 17-seat computer labs, a 20-computer roundtable Zimmerman Advertising Program lab, and a 30-seat, 20-computer, stadium-seating classroom available for instruction, as well as two smaller graduate conference rooms.

- D. Describe additional classroom, teaching laboratory, research laboratory, office, and other space needed to implement and/or maintain the proposed program through Year 5. Include any projected Instruction and Research (I&R) costs of additional space in Table 2 in Appendix A. Do not include costs for new construction because that information should be provided in response to X (E) below.**

We do not anticipate a need for additional space or equipment to accommodate the program.

- E. If a new capital expenditure for instructional or research space is required, indicate where this item appears on the university's fixed capital outlay priority list. Table 2 in Appendix A includes only Instruction and Research (I&R) costs. If non-I&R costs, such as indirect costs affecting libraries and student services, are expected to increase as a result of the program, describe and estimate those expenses in narrative form below. It is expected that high enrollment programs in particular would necessitate increased costs in non-I&R activities.**

We do not anticipate a need for additional space or equipment to accommodate the program.

- F. Describe specialized equipment that is currently available to implement the proposed program through Year 5. Focus primarily on instructional and research requirements.**

None is needed.

- G. Describe additional specialized equipment that will be needed to implement and/or sustain the proposed program through Year 5. Include projected costs of additional equipment in Table 2 in Appendix A.**

We do not anticipate a need for additional space or equipment to accommodate the program.

- H. Describe any additional special categories of resources needed to implement the program through Year 5 (access to proprietary research facilities, specialized services, extended travel, etc.). Include projected costs of special resources in Table 2 in Appendix A.**

We do not anticipate a need for additional space or equipment to accommodate the program.

- I. Describe fellowships, scholarships, and graduate assistantships to be allocated to the proposed program through Year 5. Include the projected costs in Table 2 in Appendix A.**

We do not anticipate offering scholarships at this time. Existing GA allocations are adequate to cover this new program.

- J. Describe currently available sites for internship and practicum experiences, if appropriate to the program. Describe plans to seek additional sites in Years 1 through 5.**

The Zimmerman School presently places more than 200 interns-for-credit annually in advertising and public relations with such national and Tampa Bay companies as 22squared, Nielsen Media, Triad Retail Media, FKQ, PP+K, SPARK, Dunn & Co., Amalie Arena, Telemundo Tampa, Entravision, Univision, ChappellRoberts, Tampa Bay Lightning, Tampa Bay Rays, the Tampa Sports Authority, Clearwater Threshers (MLB minor league), Fort Myers Miracle (MLB minor league), Hype Group, Shriners Hospital, Lowry Park Zoo, AARP Florida, Beasley Media, iHeart Radio group, Tampa Bay Water, Polk County Supervisor of Elections, Children's Cancer Center, to name a few of the sites. All faculty continue to work to develop new partnerships for student internships, an effort coordinated by the School's associate director with staff support.

APPENDICES

APPENDIX A

APPENDIX A
TABLE 1-B
PROJECTED HEADCOUNT FROM POTENTIAL SOURCES
(Graduate Degree Program)

Source of Students (Non-duplicated headcount in any given year)*	Year 1		Year 2		Year 3		Year 4		Year 5	
	HC	FTE	HC	FTE	HC	FTE	HC	FTE	HC	FTE
Individuals drawn from agencies/ industries in your service area (e.g., older returning students)	0	0	0	0	0	0	0	0	0	0
Students who transfer from other graduate programs within the university**	0	0	0	0	0	0	0	0	0	0
Individuals who have recently graduated from preceding degree programs at this university	20	15	25.0	18.75	30.0	22.5	35.0	26.25	40.0	30
Individuals who graduated from preceding degree programs at other Florida public universities	2	1.5	2.0	1.5	4.0	3	6.0	4.5	8.0	6
Individuals who graduated from preceding degree programs at non-public Florida institutions	2	1.5	2.0	1.5	2.0	1.5	2.0	1.5	2.0	1.5
Additional in-state residents***	0	0	0	0	0	0	0	0	0	0
Additional out-of-state residents***	0	0	0	0	0	0	0	0	0	0
Additional foreign residents***	0	0	0	0	0	0	0	0	0	0
Other (Explain)***	0	0	0	0	0	0	0	0	0	0
Totals	24	18.00	29	21.75	36	27.00	43	32.25	50	37.50

* List projected annual headcount of students enrolled in the degree program. List projected yearly cumulative ENROLLMENTS instead of admissions.
 ** If numbers appear in this category, they should go DOWN in later years.
 *** Do not include individuals counted in any PRIOR category in a given COLUMN.

APPENDIX A
TABLE 2
PROJECTED COSTS AND FUNDING SOURCES

Instruction & Research Costs (non-cumulative)	Year 1							Year 5							
	Funding Source							Funding Source							
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Columns	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Faculty Salaries and Benefits	137,774	0	0	0	0	0	0	\$137,774	256,349	0	0	0	0	0	\$256,349
A & P Salaries and Benefits	25,400	0	0	0	0	0	0	\$25,400	50,000	0	0	0	0	0	\$50,000
USFS Salaries and Benefits	0	0	0	0	0	0	0	\$0	0	0	0	0	0	0	\$0
Other Personal Services	0	0	0	0	0	0	0	\$0	0	0	0	0	0	0	\$0
Assistantships & Fellowships	0	0	0	0	0	0	0	\$0	0	0	0	0	0	0	\$0
Library	0	0	0	0	0	0	0	\$0	0	0	0	0	0	0	\$0
Expenses	0	0	0	0	0	0	0	\$0	0	0	0	0	0	0	\$0
Operating Capital Outlay	0	0	0	0	0	0	0	\$0	0	0	0	0	0	0	\$0
Special Categories	0	0	0	0	0	0	0	\$0	0	0	0	0	0	0	\$0
Total Costs	\$163,174	\$0	\$0	\$0	\$0	\$0	\$0	\$163,174	\$306,349	\$0	\$0	\$0	\$0	\$0	\$306,349

*Identify reallocation sources in Table 3.

**Includes recurring E&G funded costs ("reallocated base," "enrollment growth," and "other new recurring") from Years 1-4 that continue into Year 5.

***Identify if non-recurring.

Faculty and Staff Summary

Total Positions	Year 1	Year 5
Faculty (person-years)	1.48	2.79
A & P (FTE)	0.7	0.7
USFS (FTE)	0	0

Calculated Cost per Student FTE

	Year 1	Year 5
Total E&G Funding	\$163,174	\$306,349
Annual Student FTE	18	37.5
E&G Cost per FTE	\$9,065	\$8,169


APPENDIX A

TABLE 4
ANTICIPATED FACULTY PARTICIPATION

Faculty Code	Faculty Name or "New Hire" Highest Degree Held Academic Discipline or Speciality	Rank	Contract Status	Initial Date for Participation in Program	Mos. Contract Year 1	FTE Year 1	% Effort for Prog. Year 1	PY Year 1	Mos. Contract Year 5	FTE Year 5	% Effort for Prog. Year 5	PY Year 5
B	New Hire	Director / Professor	Tenure	Fall 2018	12	1.00	0.05	0.05	12	1.00	0.10	0.10
A	Janelle Applequist, Ph.D. Advertising/Public Relations	Assistant Professor	Tenure-earning	Fall 2018	9	0.75	0.38	0.29	9	0.75	0.56	0.42
A	Justin S. Brown, Ph.D. Advertising	Assistant Professor	Tenure-earning	Fall 2018	9	0.75	0.19	0.14	9	0.75	0.19	0.14
A	Media Policy & Legislation Saokang "Scott" Liu, Ph.D.	Associate Professor	Tenure	Fall 2018	9	0.75	0.19	0.14	9	0.75	0.38	0.29
A	Advertising Artemio Ramirez, Ph.D.	Associate Professor	Tenure	Fall 2018	9	0.75	0.38	0.29	9	0.75	0.38	0.29
A	Advertising Kelli Staples Burns, Ph.D.	Associate Professor	Tenure	Fall 2018	9	0.75	0.19	0.14	9	0.75	0.56	0.42
A	Advertising/Public Relations Kimberly K. Walker, Ph.D.	Assistant Professor	Tenure-earning	Fall 2018	9	0.75	0.19	0.14	9	0.75	0.38	0.29
A	Health Communications Kelly Page Werder, Ph.D.	Associate Professor	Tenure	Fall 2018	9	0.75	0.19	0.14	9	0.75	0.38	0.29
A	Strategic Communications Roxanne Watson, Ph.D.	Associate Professor	Tenure	Fall 2018	9	0.75	0.19	0.14	9	0.75	0.38	0.29
B	Media Law New Hire	Associate Professor	Tenure	Fall 2019	9	0.00	0.00	0.00	9	0.75	0.38	0.29
	Advertising	Professor										
	Total Person-Years (PY)							1.48				2.79
Faculty Code	Source of Funding	PY Workload by Budget Classification		Year 1	Year 5			Year 1	Year 5			Year 5
A	Existing faculty on a regular line			1.43	2.31							
B	New faculty to be hired on a vacant line			0.05	0.48							
C	New faculty to be hired on a new line			0.00	0.00							
D	Existing faculty hired on contracts/grants			0.00	0.00							
E	New faculty to be hired on contracts/grants			0.00	0.00							
Overall Totals for				Year 1	Year 5			Year 1	Year 5			Year 5
				1.48	2.79			1.48	2.79			2.79

APPENDIX B

Please include the signature of the Equal Opportunity Officer and the Library Director.

_____ Signature of Equal Opportunity Officer	_____ Date
 Signature of Library Dean	<u>1/23/17</u> Date

This appendix was created to facilitate the collection of signatures in support of the proposal. Signatures in this section illustrate that the Equal Opportunity Officer has reviewed section II.E of the proposal and the Library Director has reviewed sections X.A and X.B.

APPENDIX B

Please include the signature of the Equal Opportunity Officer and the Library Director.

_____ Signature of Equal Opportunity Officer	<u>1-26-2017</u> Date
_____ Signature of Library Director	_____ Date

This appendix was created to facilitate the collection of signatures in support of the proposal. Signatures in this section illustrate that the Equal Opportunity Officer has reviewed section II.E of the proposal and the Library Director has reviewed sections X.A and X.B.



January 24, 2017

TO: Graduate Council
University of South Florida

FROM: Dr. Donna F. Davis
Professor and Chair of the Marketing Department
Muma College of Business

RE: Concurrence for MS in Advertising

The Marketing Department of the Muma College of Business has reviewed the proposal for the Master of Science in Advertising proposal and concur with offering this program at the University of South Florida.

Donna F. Davis Digitally signed by
Donna F. Davis
Date: 2017.01.24
13:19:25 -05'00'

COLLEGE OF BUSINESS, MARKETING DEPARTMENT
University of South Florida • 4332 East Florida Avenue • Tampa, FL 33620
(813) 974-2120 • donnadavis@usf.edu

This letter is an electronic communication from the University of South Florida.

APPENDIX C

USF LIBRARY RESOURCES (SEE ATTACHED)

University of South Florida Libraries
New Degree Program for the Zimmerman School of Advertising and Mass
Communications
Master of Science Degree – Public Relations, Advertising, and Applied Communication

Overview of USF Libraries, Mission, and Program/Discipline Strengths

The University of South Florida is accredited by the Commission on Colleges of the Southern Association of Colleges and Schools to award degrees at the baccalaureate, masters, specialist, and doctoral levels, including the Doctor of Medicine. The institution was initially accredited in 1965 and was last reviewed and reaffirmed in 2015.

The University of South Florida Libraries consist of USF's main research library, located on the Tampa Campus; two special libraries, the Hinks and Elaine Shimberg Health Sciences Library and the Louis de la Parte Mental Health Institute Library, which are also located on the Tampa Campus; the Nelson Poynter Memorial Library, USF St. Petersburg; and the Jane Bancroft Cook Library, which is a joint-use facility shared with New College of Florida and USF Sarasota-Manatee campus

Our vision is to become a globally recognized academic library system advancing knowledge through integrated resources, responsive services, research, and instruction. Together, the USF Libraries provide access to more than 2 million volumes and an extensive collection of electronic resources including approximately. Together, the USF Libraries provide access to more than 2 million volumes and an extensive collection of electronic resources including approximately 58,975 e-journal subscriptions and over 900 aggregator databases containing another 92,855 unique e-journal titles, 648,751 e-books, and 826,000 digital images. In addition, students have access to over 76,000 audio/visual materials including electronic media, music scores, audiobooks, CDs, and DVDs.

The library endeavors to develop and maintain a research collection that satisfies the resource needs of the undergraduate curriculums in all of the subject disciplines and also meets the specialized needs of the graduate students and faculty for advanced research materials.

The Zimmerman School of Advertising and Mass Communications currently offers a single graduate degree, a Master of Arts in Mass Communications, which provides two study tracks, Media Studies and Strategic Communication Management. The media studies track concentrates on mass communication theory, public opinion, research methods, sports & media, women & media, and visual communication. The strategic communication management track integrates public relations, advertising and marketing communication into a single focus. The new degree program, a Master of Science in Public Relations, Advertising, and Applied Communication, will enhance the current graduate program offerings, and will provide more in-depth coverage of these subject areas within their respective academic disciplines.

The USF Tampa Library has been supporting the Master of Arts in Mass Communication degree program by actively collecting resources in the following subject areas: advertising, advertising methodology/psychology, comparative media studies, international advertising, international media, mass media and society, media ethics, media law, media history, digital media, visual communication, e-commerce, entrepreneurship, public relations, public relations management and theory, sports & media, and women & media. The USF Tampa Library has also been actively collecting resources for the entire College of Business, which includes the Marketing Department. The proposed Master's Degree in Public Relations, Advertising, and Applied Communication, will benefit greatly from the resources that are currently available, and by new resources that will reflect current research developments within these subject areas.

University of South Florida Libraries
Collection Analysis for the School of Advertising and Mass Communications
Proposed Master's Degree in Public Relations, Advertising, and Applied Communication

USF Libraries Collections

Emphasis is on acquiring and maintaining a robust collection of electronic journals and in developing a strong research monographic eBook collection representing the important trade, university and professional presses. An extensive eBook collection stretches the library's expendable budget and gives faculty and graduate students access to the most recent research materials that are available – from anywhere, at any time. USF faculty and students have access to research materials not available on the Tampa campus through the Library's Interlibrary Loan and Document Delivery services.

The following is a brief summary of the USF Libraries collections in the relevant subject areas:

➤ **Number of Books, E-Books, Journals, and E-Journals in Advertising, Marketing, Mass Communications, and Public Relations.**

Academic Discipline	Books	E-Books	Journals	E-Journals	Totals
Business Resources @ USF Libraries	19,947	22,358	616	2,390	45,311
Targeted Sub-Disciplines					
Advertising	1,366	1,237	27	83	2,713
Marketing	2,706	2,263	98	270	5,337
Mass Communications (Mass Media)	2,697	900	78	189	8,050
Public Relations	1,660	609	18	44	2,331
Totals	8,429	5,009	221	586	14,245

➤ **Notable online journals*, owned by the USF Libraries, include:**

Titles collected by the USF Libraries also represent those that are highest rated in their respective research fields. The USF Libraries provide electronic access to 36 of the highest rated journals in Advertising, Marketing, Mass Communications, and Public Relations, ranked by ISI Impact factor. These ratings do not always represent true journal value, but the USF Libraries seek to obtain virtually all statistically important journal titles in these fields.

Journal Title	Impact Factor	USF Owns
Journal of Business Venturing	4.204	yes
Journal of Marketing	3.885	yes
Journal of the Academy of Marketing Science	3.744	yes
Journal of Interactive Marketing	3.256	yes
Journal of International Marketing	3.250	yes
Journal of Consumer Research	3.187	yes
Journal of Marketing Research	3.109	yes
Marketing Theory	2.673	yes
Journal of Service Research	2.462	yes
Journal of Advertising	2.288	yes
Journal of Business Research	2.129	yes
Journal of Retailing	2.014	yes
Journal of Consumer Psychology	2.009	yes
Industrial Marketing Management	1.930	yes
International Journal of Research in Marketing	1.833	yes
Journal of Travel and Tourism Marketing	1.741	yes
Marketing Science	1.647	yes
International Marketing Review	1.588	yes
Marketing Letters	1.508	yes
Journal of Macromarketing	1.429	yes
Psychology & Marketing	1.367	yes
Public Relations Review	1.249	yes
International Journal of Advertising	1.169	yes
Journal of Public Policy Marketing	1.150	yes
European Journal of Marketing	1.088	yes
International Journal of Consumer Studies	1.086	yes
Journal of Consumer Affairs	1.053	yes
Journal of Destination Marketing Management	1.034	yes
Journal of Services Marketing	1.021	yes
Journal of Advertising Research	0.985	yes
Journal of Business & Industrial Marketing	0.973	yes
QME Quantitative Marketing and Economics	0.846	yes
International Journal of Market Research	0.697	yes
Journal of Business to Business Marketing	0.500	yes
Journal of Mass Media and Ethics	0.405	yes
International Journal of Sports Marketing & Sponsorship	0.394	yes

*Figures from Thomson Reuters ISI - InCites Journal Citation Reports (2015)

- **E-Journal Packages include:** ABI/INFORM Complete; JSTOR Business; The Economist Historical Archive (1843-2007); EBSCOhost Electronic Journals Service; Elsevier Science Direct; Taylor & Francis; Wiley Online Library; and Communication Studies: a SAGE Full-Text Collection.

University of South Florida Libraries
Collection Analysis for the School of Advertising and Mass Communications
Proposed Master's Degree in Public Relations, Advertising, and Applied Communication

➤ **Number of Databases in Advertising, Marketing, Mass Communications, & Public Relations**

There are over 900 electronic databases provided and managed by the USF Libraries and the USF Tampa Library. Several of the key resources that would be most relevant for the proposed Master's Degree in Advertising, Marketing, Mass Communications, & Public Relations include:

- **ABI Inform- Vendor: ProQuest**
This database includes ABI/INFORM Global, ABI/INFORM Trade and Industry, and ABI/INFORM Dateline. The database features thousands of full-text journals, dissertations, working papers, key newspapers such as The Wall Street Journal and The Financial Times, as well as country-and industry-focused reports and data.
- **Business Insights: Gale Group**
A multi industry, international database that provides access to company, industry, market, and product information
- **Business Source Premier (1922-): EBSCO**
Business Source Premier is one of the definitive scholarly databases in the field of business due to its depth and coverage.
- **Communication Abstracts (1977-) : EBSCO**
Communication Abstracts is a comprehensive source of information about communication-related publications on a world-wide scale. Datamonitor360 provides global business information, delivering data, analysis and opinion.
- **IBISWorld: IBISWorld**
IBISWorld provides reports for all of the 723 US industries enabling research on the entire sector of the U.S. economy. Information is updated every four months, ensuring the latest information. Reports are divided into three searchable modules: industry market research; company research, and business environment.
- **LexisNexis Academic: LexisNexis**
Research areas in LEXIS-NEXIS Academic cover news, industry, and market news, and legal news.
- **MarketResearch.com academic: Market Research**
MarketResearch.com a current snapshot of an industry including market overview, market definition, market share, market forecast, distribution, and demographics.
- **Market Share Reporter: Gale Group**
This database is part of Gale's Digital Directory Library Collection, the database provides comparative business statistics (arranged by 4-digit SIC code) for companies, products and services.
- **Mintel oxygen (Intel reports): Intel International Group**
Intel oxygen (Intel reports) is one of the leading marketing research databases being utilized by 120 of the top U.S. universities. It has become one of the best resources for timely and unique information about the business to consumer (b2c) marketplace.
- **SRDS (formerly SRDS Media Solutions): SRDS**
SRDS Online provides access to electronic versions of the following SRDS print publications: Consumer Magazine Media; Business Publications Media; Direct Marketing; Newspaper Media; Radio Media; and Cable & TV Media.
- **TableBase (RDS Business Suites): Gale Group**
TableBase is an international database that specializes exclusively in tabular data dealing with companies, industries, products and demographics. Tables cover market share, rankings, forecasts, shipments, output, consumption, users, exports, imports, and capacity.

- **WRDS (The Global Standard for Business Research): Wharton School**

Wharton Research Data Services (WRDS) is a web-based business data research service from The Wharton School at the University of Pennsylvania.

The USF Libraries also have subscriptions to almost all other major databases in the social sciences and business, including several comprehensive e-Journal and eBook packages, the ISI Web of Science database. Use of all of these resources is extremely high, which helps to justify the spending for research level resources in business, marketing, and mass communications. The USF Libraries pay over \$6 million annually for resources and also leverage consortial buying with good negotiations and packaging of resources to ensure maximum product per research dollar.

➤ **Clendinen Virtual Reading Room**

The Clendinen Virtual Reading Room was named in honor of the late James A. Clendinen, former editor of the Tampa Tribune. The Clendinen Virtual Reading Room provides a gateway to open access resources and to proprietary databases related to the study of mass communications. Access to the databases is restricted to University of South Florida faculty, students and staff. The Virtual Reading Room was created and is maintained by the USF Libraries as a resource center for the USF School of Mass Communications. It serves as a complement to the physical reading room located in the Communication and Information Sciences building on the USF Tampa Campus.

Summary Statement

In any given year, the USF Libraries materials budget is pushed to its limit. The rising cost of continuing journal subscriptions, the need for new research materials, and requests for access to online data sets are part of the daily landscape. A large portion of the USF Libraries' 6.3 million budget supports the continuation of the electronic resources. The subject disciplines of business, mass communications, advertising, and telecommunications are well represented throughout the USF Libraries electronic collections.

Recognizing the value and importance of research and teaching within the academic disciplines of Business, Advertising, Marketing, Mass Communications, and Public Relations, the USF Libraries will continue a sustained level of support for graduate level research in these disciplines and in allied and associated subject areas.

Within the next five years, the expectation would be for a continued level of support for these disciplines. An increase in the cost of the library's journal subscriptions would be anticipated, with typical annual increases of 3-6 %. The acquisition of additional resources would have to be balanced against the research needs of other academic disciplines on campus within the confines of any budgetary restraints that the university could face during the next five years.

Prepared by:

Cheryl McCoy, Associate Director of Academic Resources, USF Libraries

Date: 1/18/17

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University of South Florida Libraries
Collection Analysis for the School of Advertising and Mass Communications
Proposed Master's Degree in Public Relations, Advertising, and Applied Communication

As of January 2017, the collections of the USF Tampa Library and affiliates are sufficient to support the Master of Science Degree in Public Relations, Advertising, and Applied Communication in the School of Advertising and Mass Communications in the College of Arts & Sciences. Sustained annual investments to maintain the recurring elements of this collection and to purchase newly published materials are required to preserve sufficiency. With escalating costs, typical annual increases of 3-6% are likely. Strategic investments are required as new faculty are hired and areas of emphasis evolve.

Certified by:

/Signature appears previously in proposal/

Todd Chavez, Dean of USF Libraries

Date: 1/23/17

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APPENDIX D

CURRICULUM VITAE

JANELLE APPLEQUIST

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EDUCATION

Ph.D. Mass Communications, GPA: 3.97
College of Communications, The Pennsylvania State University, 2015
M.A. Media Studies
The Pennsylvania State University, 2011, GPA: 3.94
B.A. Broadcast Journalism, Minor: Psychology
The Pennsylvania State University, University Park, 2009
Cumulative GPA: 3.84 GPA for Major: 4.00

ACADEMIC APPOINTMENTS

Assistant Professor, Tenure-Track
The Zimmerman School of Advertising and Mass Communications
University of South Florida
August 2015-present

Graduate Instructor
Department of Film-Video and Media Studies
The Pennsylvania State University (University Park)
Summer 2012-Spring 2015

Graduate Teaching Assistant
Department of Film-Video and Media Studies
The Pennsylvania State University (University Park)
Spring 2011-Fall 2012

JOURNAL ARTICLES

Applequist, J. (2014). "The part too often left out involves the perspectives of patients": Helping health care providers understand the material reality of the everyday for individuals with eating disorders. *Journal of Medicine and the Person*, 12(3), 118-124. doi: 10.1007/s12682-014-0186-1

Applequist, J. (2014). Pinterest, gender reveal parties and the binary: Reducing an impending arrival to "pink" or "blue." *Pennsylvania Communication Annual*, 70(3), 51-65. ISSN: 2372-6350

Applequist, J. (2013). Constructions of the patient as consumer in the patient-centered medical home. *Journal of Communications Media Studies*, 5(1), 44-58.

Applequist, J. (under review). Appeals used to sell prescription drugs: Critical and content analyses of prime time television direct-to-consumer advertising. *Journal of Communication*.

Applequist, J., Miller-Day, M., Bricker, P.L., Bleser, W.K., Cronholm, P.F., & Gabbay, R. A. (under review). "In principle we have agreement, but in practice it is a bit more difficult": Obtaining organizational buy-in to patient-centered medical home transformation. *Journal of Health Communication*.

BOOK CHAPTERS

Applequist, J. (accepted and forthcoming). "Let it go, let it go!": Resistance via counterhegemony and traditional representations of hegemony as seen in Disney's *Frozen*. In K.

Roberts (Ed.), *Communication Basics for Millennials – Essays on Communication Theory and Culture*. New York, NY: Peter Lang.

REFEREED PAPERS PRESENTED AT PROFESSIONAL MEETINGS

Applequist, J. (2015, November). *How the Pharmaceutical Industry Portrays "Successful" Elements of Aging Alongside Consumerist Health Discourses in Advertising*. To be presented at the National Communication Association, Las Vegas, NV.

Applequist, J. (2015, November). *TEDx Talks: Embracing Opportunities for Outreach*. To be presented at the National Communication Association, Las Vegas, NV.

Applequist, J. (2015, November). *The Commercial Elements of Constructing a Prescription Drug: A Case Study of YAZ and its Implications for Perceived Feminist Empowerment*. To be presented at the National Communication Association, Las Vegas, NV.

Applequist, J. (2015, November). *Click "Healing": A Case Study of Pharmaceutical Advertising Online and Nexium's Website as a form of the Health Belief Model*. To be presented at the National Communication Association, Las Vegas, NV.

Applequist, J. & McAllister, M. (2015, April). *Understanding the Commercialization of Mediated Politics from a Political Economic Perspective*. Presented at the Eastern Communication Association, Philadelphia, PA.

Applequist, J. (2014, November). *The Implementation of Electronic Medical Records: Best Practices for Increasing Overall Healthcare Understanding while Decreasing Medical Costs*. Presented at the National Communication Association, Chicago, IL.

Applequist, J. (2014, November). *Approaching Anorexia and Recovery via Ethnographic Research: How the Transtheoretical Model of Change can be used as a Supplement to Health Care Provider and Patient Education*. Presented at the National Communication Association, Chicago, IL.

Applequist, J. & Antunovic, D. (2013, May). *Belieber discourses: Justin Bieber's faith in secular and the religious markets*. Presented at the Beyond the Margins conference, Chicago, Illinois.

Applequist, J. (2013, March). *Is it a girl or a boy? Gender reveal parties and Pinterest*. Graduate Student Exhibition. Poster presentation at the Pennsylvania State University, University Park, PA.

Applequist, J. (2013, March). *Health care messages in support of eating disorder recovery: Obtaining patient voice and having empathy*. Presented at the Communications Graduate Forum conference, University Park, PA.

Applequist, J. (2012, November). *The digitization of medical records and the ethical implications: How privacy concerns can be alleviated through proper attention and education*. Presented at the National Communication Association, Orlando, FL.

Applequist, J. (2012, November). *Constructions of the patient-centered medical home's information technology: Viewing the "patient" as "consumer."* Presented at the National Communication Association, Orlando, FL.

Elavsky, M., Applequist, J., & Morar, D. (2012, March). *Global communication pedagogy as hybridized collaborative engagements*. Presented at the Penn State Symposium for Teaching and Learning with Technology, University Park, PA.

Applequist, J. (2010, October). *Direct-to-consumer advertising and health*

communication research. Presented at the Union for Democratic Communications, University Park, PA.

RESEARCH REPORTS FOR THE MEDICAL FIELD

Applequist, J. (2014, May). *TED Speaker Encourages to "Find Your Moment and Share it with the World"*. 2014 Research Articles: Issue 8. Conquer Chiari Non-Profit Foundation. Available online at <http://www.conquerchiari.org/subs%20only/Articles%20%2714/find-your-moment.html>.

Applequist, J. (2013, August). *PAFP Research Report on "Transitioning to a Patient-Centered Medical Home (PCMH): How Practices are Educating Transformation to Patients and Perceived Effectiveness of Patient Education by Professional Role"*. N.P.: The Pennsylvania Academy of Family Physicians and the Penn State Milton S. Hershey Medical Center. (distributed to all 4,000+ PAFP members statewide)

Gabbay, R., M.D., Miller-Day, M. & Applequist, J. (2013, February). *PAFP Research Report*. N.P.: The Pennsylvania Academy of Family Physicians and the Penn State Milton S. Hershey Medical Center.

GRANTS

Full Grant Recipient. (2013). The Don Davis Program in Ethical Leadership, project titled *Walt Disney World's Representations of Culture: Epcot's World Showcase and Commodified Ethnocentrism*, The Pennsylvania State University, 2013 (\$2,500).

Full Grant Recipient. (2013). The Arthur W. Page Center for Integrity in Public Communications, project titled *Organizational Communication and the transition to a patient-centered medical home (PCMH): How practices are advertising health and wellness programs to patients in accordance with the PCMH's principles*, The Pennsylvania State University, 2013 (\$2,500).

Full Travel Grant Recipient. (2013). European Sociological Association, Turin, Italy; August 2013.

Full Travel Grant Recipient. (2012). Cultural Studies Association of Australasia, Sydney, Australia; December 2012.

Grant Co-Writer and Team Recipient. (2012). U.S. Department of Health and Human Services – Agency for Healthcare Research and Quality & the Aetna Foundation, for a longitudinal project coordinated with The University of Pennsylvania and the Milton S. Hershey Medical School, conducting research 2011-present.

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EDUCATION

Ph.D., Mass Communications, 2001
College of Communications
The Pennsylvania State University
University Park, PA

M.A., Telecommunications Studies, 1997
College of Communications
The Pennsylvania State University
University Park, PA

B.S., Journalism, 1993
School of Journalism and Communication
University of Oregon
Eugene, OR

ACADEMIC EXPERIENCE

Assistant Professor, 2011-present
School of Mass Communications
University of South Florida

Assistant Professor, 2009-2011
Department of Mass Communication
College of Arts & Sciences
Winthrop University

Assistant Professor, 2001-2008
Department of Telecommunication
College of Journalism and Communications
University of Florida

PUBLICATIONS

"Neutrality 2.0: The Broadband Transition to Transparency," lead author with Drew Bagley, accepted for publication in *Fordham Intellectual Property, Media & Entertainment Law Journal*, Vol. 25 (2015).

"Consumer Legal Protections Against the Layers of Big Data," co-author with Drew Bagley, accepted for publication in *Santa Clara High Technology Law Journal*, Vol. 31 (2015).

"Determinants of IPTV Diffusion," co-authored with Sangwon Lee, Seonmi Lee and Eun-A Park, *Telematics & Infomatics* 32, 439-446 (2015).

"The Determinants of Ubiquitous Broadband Deployment: Examination of Adoption Factors among Developed and Developing Countries," co-authored with Sangwon Lee, in Richard Taylor & Amit Schejter (Eds.), *Beyond Broadband Access: Data Based Information Policy*, 69-87, New York, NY: Fordham University Press (2013).

"A Cross-Country Analysis of Fixed Broadband Deployment: Examination of Adoption Factors and Network Effect," co-authored with Sangwon Lee and Seonmi Lee, *Journalism & Mass Communication Quarterly* 88 (3), 580-596 (2011).

"Liberty Tree Initiative Events Make the First Amendment Come Alive" *Media Law Notes* 38 (2) 2010, pp. 1 & 3.

"Examining Broadband Adoption Factors: An Empirical Analysis Between Countries," with Sangwon Lee, *info* 10 (1), 25-39 (2008).

"The Future of the Broadcast Flag: An Analysis of the Broadcast Flag's Compatibility with Existing Copyright Law & Incompatibility with the Digital Media Marketplace," with Drew Bagley, *IDEA: The Intellectual Property Law Review* 47(5) 607-658 (2007).

"Cable Operators' Fifth Amendment Claims Applied to Digital Must-Carry," co-authored with Nissa Laughner, *Federal Communications Law Journal* 58(2), 283-322 (2006).

"Digital Must-Carry and the Case for Public Television," *Cornell Journal of Law & Public Policy* 15(1), 73-109 (2005).

"Fostering the Public's End-to-End: A Policy Initiative for Separating Broadband Transport from Content," *Communication Law & Policy* 8(2), 145-199 (2003).

"Explicating Online Interactivity: Impression-Formation Effects in Political Websites," co-authored with S. Shyam Sundar and Sriram Kalyanaraman, *Communication Research* 30(1), 30-59 (2003).

Author of "learning objectives" and "multiple choice questions" for CD-ROM Study Guide to Accompany Don Pember's *Mass Media Law* (2002-03, 2004-05 Eds.)

"Cultures, Institutions and Organizations on the Internet," *UNESCO's Encyclopedia of Life Support Systems (EOLSS)*, Vol. 6.33.4.2 (2003).

"Video Voyeurism, Privacy and the Internet: Exposing Peeping Toms in Cyberspace," co-authored with Clay Calvert, *Cardozo Arts & Entertainment Law Journal* 18, 469-568 (2000).

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Education

Ph.D. (8/03) University of Florida Gainesville, FL
 Mass Communication

M.S. (5/98) Middle Tennessee State University Murfreesboro, TN
 Mass Communication

B.A. (5/92) Vanderbilt University Nashville, TN
 Mathematics, Business Administration (minor)

Administrative Experience

University of South Florida
 Associate Program Director and Director of Undergraduate Studies 2012-2014
 Public Relations Sequence Head 2010-2012

Elon University
Fellows Program Director 2004-2006

Teaching Experience

University of South Florida
 Associate Professor 2011-present
 Assistant Professor 2006-2011

Elon University
 Assistant Professor 2003-2006

Middle Tennessee State University
 Instructor 2002-2003

University of Florida
 Instructor 1999-2000

Books

Burns, K.S. (forthcoming 2016). *Social media: A reference handbook*. ABC-CLIO.
 Burns, K.S. (2009). *Celeb 2.0: How social media foster our fascination with popular culture*. Santa Barbara, CA: Praeger.

Refereed Journal Publications

Burns, K.S. (2015, forthcoming). "How the top social media brands use influencer and brand advocacy campaigns to engage fans". *PRism*.

Burns, K.S. (2012). "Mommy bloggers speak out: Reactions to the FTC's guidelines concerning the use of endorsements and testimonials". *Journal of New Communications Research, 2011 Anthology*.

Burns, K.S. (2008). "The misuse of social media: Reactions to and important lessons from a blog fiasco". *Journal of New Communications Research, 3(1)*, 41-54.

Burns, K.S., & Lutz, R. J. (2008). "Web users' perceptions of and attitudes toward online advertising formats". *International Journal of Internet Marketing and Advertising, 4(4)*, 281-301.

Kuhn, A., & Burns, K.S. (2008). "From MySpace to BrandSpace: Elements of brand-sponsored MySpace

- profiles". In S. Rodgers (Ed.), *Proceedings of the 2008 Conference of the American Academy of Advertising*.
- Burns, K.S., & Lutz, R. J. (2006). "The function of format: Consumer responses to six online advertising formats". *Journal of Advertising*, 35(1), 53-64.
- Burns, K.S. (2006). "Problems found in reporting USA Today pre-election polls". *Newspaper Research Journal*, 27(4), 38-51.
- Burns, K.S., & Lutz, R. J. (2004). "Format matters: Examining the precursors to and effects of attitudes toward six online advertising formats". Abstract published in the *Proceedings of the 2004 Conference of the American Academy of Advertising*, 239-240.
- Burns, K.S. (2000). "Branding in cyberspace: Using the congruity of consumer and Web site personality to unravel online user satisfaction". *Proceedings of the 2000 Conference of the American Academy of Advertising*.

Scott S. Liu, Ph.D.

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Professional Experience

1999 – present Associate Professor, School of Mass Communications, USF
2007 – 2009 Zimmerman Endowed Professor, School of Mass Communications, USF
1993 – 1999 Assistant Professor, School of Mass Communications, USF
1996 (summer) Visiting Professor, Disney/ABC Network
1994 – 1995 Visiting Professor, Dept. of Advertising, National Chengchi University, Taiwan
1989 – 1992 Assistant Professor, Manship School of Journalism, Louisiana State University

Education

Ph.D. in Advertising, University of Texas at Austin
M.A. in Journalism, University of Wisconsin at Madison
B.A. in Foreign Language and Literature, Tunghai University, Taiwan

Sample Research

Hickman, J. & Liu, S. (2013). Framing presidential speeches on the end of Operation Iraqi Freedom. Paper presented at the AEJMC Southeast Colloquium, Tampa, FL.
Liu, S., Johnson, K. & O'Brien, C. (2009). Why copycats sell: A dual-process explanation. *Proceedings of the American Academy of Advertising Asian-Pacific Conference in Beijing*, 112-114.
Begin, G. & Liu, S. (2006). Attitudinal antecedents of the first- and third-person effects of alcohol advertising on college students. *Proceedings of the Annual Conference of the American Academy of Advertising*, 64-71.
Liu, S. & Johnson, K. (2005). The automatic country-of-origin effects on brand judgments. *Journal of Advertising*, 34 (1), 87-97.
Liu, S. (1999). When the irrelevant becomes relevant: The similarity-to-old effect on brand categorization. *Journal of Current Issues & Research in Advertising*, 31-47.
Liu, S. & Stout, P. (1987). Effects of message modality and appeal on advertising acceptance. *Psychology and Marketing*, 167-187.
Liu, S. & Franke, G. (1986). Improving marketing measures by rescaling variables: A comparison of dual Scaling and PRINQUAL. In R. King (Ed.), *Marketing in an environment of change* (pp. 236-250). Charleston, SC: SMA.

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Education

Ph.D. Communication: University of Arizona, December 2000

M.A. Communication and Theater: The University of Illinois at Chicago, 1992

B.A. Communication and Theater: The University of Illinois at Chicago, 1990

Summary of Professional Experience

2014-present Associate Professor

Zimmerman School of Advertising and Mass Communications
 University of South Florida, Tampa, FL

2012-2014 Associate Professor

Department of Communication
 University of South Florida, Tampa, FL

2011-2012 Associate Professor in Communication

University of South Florida Polytechnic, Lakeland, FL

2008-2011 Assistant Professor

Hugh Downs School of Human Communication
 Arizona State University (*tenured 5/11*)

Publications

Ramirez, Jr., A., Sumner, E. M., & Spinda, J. S. W. (2016, in press). The relational reconnection function of social network sites. *New Media & Society*.

Sumner, E. M., & Ramirez, Jr., A. (2016, in press). Social information processing theory/Hyperpersonal perspective. In P. Roessler, C. Hoffner, & L. van Zoonen (Eds.), *International Encyclopedia of Media Effects*. West Sussex, England: Wiley-Blackwell/International Communication Association. (6,000 words)

Sumner, E. M., & Ramirez, Jr., A. (2016, in press). Media and technology studies. In M. Allen (Ed.), *SAGE Encyclopedia of Communication Research Methods*. Thousand Oaks, CA: Sage. (2,500 words)

Sumner, E. M., Fletcher, J., & Ramirez, Jr., A. (2016, in press). A functional approach to social network sites. In K. Wright, & L. M. Webb (Eds.), *Computer-Mediated Communication in Personal Relationships* (2nd ed.). Cresskill, NJ: Hampton Press.

Ramirez, Jr., A., & (Bryant) Sumner, E. (2015, in press). Modality switching. In C. Berger, & M. Roloff (Eds.), *International Encyclopedia of Interpersonal Communication*. West Sussex, England: Wiley-Blackwell. (4,000 words)

Ramirez, Jr., A., Sumner, E. M., Fleuriet, C., & Cole, M. (2015). When online dating partners meet offline: The effect of modality switching on relational communication between online daters. *Journal of Computer-Mediated Communication*, 20, 99-114.

Walther, J. B., Van Der Heide, B., Ramirez, A. Jr., Burgoon, J. K., & Pena, J. (2015). Interpersonal and hyperpersonal dimensions of computer-mediated communication. In S. S. Sundar (Ed.), *The Handbook of Psychology and Communication Technology* (pp. 3-22). West Sussex, England: Wiley-Blackwell.

Rader, J., McDaniel, T., Ramirez, Jr., A., Bala, S., & Panchanathan, S. (2014). A Wizard of Oz study exploring how agreement/disagreement nonverbal cues enhance social interactions for individuals who

- are blind. In C. Stephanidis (Ed.), *Proceedings of the 16th International Conference on Human-Computer Interaction* (V17, pp. 243-248). Crete, Greece. Springer International; Switzerland.
- Ramirez, Jr., A., & Bryant, E. M. (2014). Relational reconnection on social network sites: An examination of relationship persistence and modality switching. *Communication Reports, 27*, 1-12. [Lead Article]
- Bryant, E., Marmo, J., & Ramirez, Jr., A. (2011). A functional approach to social network sites. In K. Wright, & L. M. Webb (Eds.), *Computer-Mediated Communication in Personal Relationships* (pp. 3-20). Cresskill, NJ: Hampton Press.
- Dimmick, J., Feaster, J., & Ramirez, Jr., A. (2011). The niches of interpersonal media: Relationships in time and space. *New Media & Society, 13*, 1265-1282.
- Ramirez, Jr., A., Palazzolo, K., Savage, M., & Deiss, D. (2010). New directions in understanding cyberbullying: Towards conceptualizing a message-based approach. In R. Taiwo (Ed.), *Handbook of Research on Discourse Behavior and Digital Communication: Language Structures and Social Interaction* (pp. 729-744). Hershey, PA: Information Science Reference [IGI Global].
- Ramirez, Jr., A., Sunnafrank, M., & Goei, R. (2010). Predicted outcome value theory in ongoing relationships. *Communication Monographs, 1*, 27-50.

Kimberly K. Walker, Ph.D.

Assistant Professor
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CURRENT ACADEMIC POSITION

Present Assistant Professor, The Zimmerman School of Advertising and Mass Communications,
Tampa, FL

Present Affiliate Assistant Professor, Indiana University School of Dentistry, Indianapolis, IN.

EDUCATION WITH DATE OF GRADUATION

5/2009 PhD, Mass Communication/Minor Public Health; School of Journalism, Indiana University, IN.

12/2002 MA, Journalism; Department of Journalism, Ball State University, IN.

5/1989/1990 BS, Political Science and Accounting, Anderson University, IN.

ACADEMIC AND TEACHING APPOINTMENTS:

8/2015 Assistant Professor, The Zimmerman School of Advertising and Mass Communication, USF,
Tampa, FL.

2014-2015 Assistant Professor, Joint appointment. Preventive and Community Dentistry, Indiana
University School of Dentistry, Indianapolis IN.

Assistant Professor, Department of Journalism and Public Relations,
School of Liberal Arts, Indianapolis, IN.

2012-2014 Assistant Professor, Indiana University School of Journalism at IUPUI, Indianapolis, IN.

2011-2012 Visiting Assistant Professor, Indiana University School of Journalism at IUPUI, Indianapolis,
IN.

2011 Grant Specialist, Indiana University School of Journalism at IUPUI, Indianapolis, IN.

2006 Adjunct Instructor, Indiana University School of Journalism, Bloomington, IN.

2005 Adjunct instructor, Department of Communication and Design Arts (formerly Department of
Communication), School of Humanities, Anderson University, Anderson, IN.

2003 Adjunct instructor, Falls School of Business, Anderson University, Anderson, IN.

2002-2003 Adjunct instructor, Department of Journalism, Ball State University, Muncie, IN.

2001 Adjunct instructor, Ivy Tech, Anderson, IN.

PEER REVIEWED PUBLICATIONS

- Walker, K. & Jackson, R. (accepted for publication). The importance of developing communication skills: Perceptions of dental hygiene students. *Journal of Dental Hygiene*.
- Walker, K. (2015). Health information seeking and implications for the operative dentist. *Operative Dentistry*, 40 (5), 451-457. doi: <http://dx.doi.org/10.2341/14-312-LIT>.
- Walker, K. & Jackson, R. (2015). The Health Belief Model and determinants of oral hygiene practices and beliefs in pre-teen children: A pilot study. *Pediatric Dentistry*, 37 (1), 40-45.
- Walker, K. K., Steinfert, EL, & Keyler, MJ. (2015). Cues to action as motivators for children's brushing. *Health Communication*, 30 (9), 911-921. doi:10.1080/10410236.2014.904030.
- Walker, K. K. (2015). A content analysis of cognitive and affective uses of patient support groups for rare vascular diseases: Comparisons of May Thurner, Thoracic Outlet and Superior Mesenteric Artery Syndrome. *Health Communication*, 30 (9), 859-871. doi: 10.1080/10410236.2013.853225.
- Walker, K. K. (2014). Cognitive and affective uses of a Thoracic Outlet Syndrome Facebook support group. *Health Communication*, 29 (8), 773-781.
- Walker, K. K. (2013). A case study of patient support group uses for three rare disorders: Klippel-Trenaunay-Weber, Superior Mesenteric Artery, and Thoracic Outlet Syndromes. *Journal of Rare Disorders*, 1(2), 45-52.
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 SCHOOL OF MASS COMMUNICATIONS
 UNIVERSITY OF SOUTH FLORIDA
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EDUCATION:

Ph.D. Mass Communications University of Florida Gainesville, Florida, U.S.A.		2006
Legal Education Certificate (L.E.C.)	Norman Manley Law School Mona, Jamaica, W.I.	1998
LLB. Cave Hill, Barbados, W.I.	University of the West Indies	1996
M.A. Journalism	University of Miami Coral Gables, Florida, U.S.A.	1992
B.A. History & Social Sciences	University of the West Indies Mona, Jamaica, W.I.	1989

DISSERTATION TOPIC:

A Comparison of Public Person Libel Laws in the United States and the Caribbean

TEACHING EXPERIENCE:

Courses Taught as instructor on record:

<i>School of Mass Communications, University of South Florida</i>	The Law & Mass Media (MMC 6612) Communication Theory (MMC 6401)
Communications Law(MMC 4200)	Public Affairs Reporting (JOU 4181)
Advanced Reporting (JOU 3101)	Beginning Reporting (JOU 2100)
<i>College of Journalism & Communications, University of Florida</i>	Writing for Mass Communication (MMC 2100) Law of Mass Communication (MMC 4200)

PROFESSIONAL EXPERIENCE:

Attorney-at-Law/ Associate, <i>Watson & Watson, Attorneys-at-Law Kingston, Jamaica</i>	*Providing Legal services in: *Land law & the management of estates; *Civil & criminal litigation; *Researching & advising clients of their legal rights.	2000-2002
Attorney-at-Law/Clerk of the Court, <i>Resident Magistrates Court Kingston, Jamaica</i>	*Providing Legal services in: *The prosecution of criminal cases; *Advising litigants of their legal rights.	1998-2000

Public Relations Account Executive,*Writing advertising copy & speeches; 1992-1993
Corporate Affairs Research & Advertising (CARA) Ltd. *Creating brochures, staff magazines;
 Kingston, Jamaica *Planning & organizing functions;
 *Planning & implementing Public Relation Campaigns.

Public Relations Account Executive,*Writing news releases & messages; 1990-1992
Jamaica Information Service * Public Relation Campaigns;
 Kingston, Jamaica * Compiling content analyses of media coverage.

Reporter, *Writing news stories for wire service; 1991-1992
UM News Bureau *Feature writing & general reporting for wire
 Miami, Florida service;
 *Copy editing.

Public Relations Intern, *Writing News stories; Fall 1991
UM Relations Dept. *Writing Articles;
 Miami, Florida *Promoting the Programs of University of Miami.

Reporter, *Covering general assignments; 1989-1990
The Gleaner Co. Ltd. *Investigative journalism;
 Kingston, Jamaica *Writing news features & profiles.

PUBLICATIONS:

Watson, R. (2011) "Dagging" and the Regulation of Questionable Broadcast Media Content in Jamaica, *Communication Law & Policy*, 16(3) 255-315.

Watson, R. (2009) The Status of Criminal Libel in Grenada After *Worme v. Commissioner of Police*, *Communication Law & Policy*, 14(2) 177-234.

Watson, R.(2008) The Native Baptist Church's Political Role in Jamaica: Alexander Bedward's Trial for Sedition, *Journal of Caribbean History*, 42(2) 231-254

Watson, R. (2007) Marcus Garvey's Trial for Seditious Libel in Jamaica, *Journalism History*, 33(3) 173-184 Fall 2007

Watson, R., Headwords "European Convention of Human Rights," *Encyclopedia of Political Communication*, vol. 1, 216 (Lynda Lee Kaid & Cristina Holtz-Bacha (eds.), Sage Publications, Los Angeles, 2008).

Watson, R. Headwords "Red Lion Broadcasting v. U.S." *Encyclopedia of Political Communication*, vol. 2, 705 (Lynda Lee Kaid & Cristina Holtz-Bacha (eds.), Sage Publications, Los Angeles, 2008).

Watson, R. "Freedom of the Press under Attack during the 1938 Labor Risings in Jamaica: The Prosecution of the Publishers of the *Jamaica Labour Weekly*," *American Journalism* (under review).

Watson, R. "Freedom of Press in the time of War and Imperialism: the prosecution of Roger Mais and *Public Opinion* in Jamaica," *Journal of Imperialism & Colonial History* (under review).

Watson, R. "Edward Jordon's newspaper, *The Watchman*, and the Emancipation of Slaves in Jamaica," *Journalism History* (under review).

Brown, E. & R. Watson "Corporate Speech: A Frame Analysis of CNN, MSNBC, and Fox News Coverage of *Citizens United v. FEC*," *Communication Law and Policy* (submitted).

MANUSCRIPTS/BOOK PROPOSALS

Watson, R. *Toward Reform of Defamation Laws in the British Caribbean: The Public Person Standard in Defamation Actions* (under review by Ian Randle Publishers, Kingston, Jamaica).

Watson, R. *Unsung Heroes of progressive movements in Jamaica: the use of criminal prosecutions to suppress expression in popular movements in Colonial Jamaica: 1832-1944* (under review by Ian Randle Publishers, Kingston, Jamaica).

PAPERS PRESENTED AT NATIONAL CONVENTIONS:

2011: "Edward Jordon's newspaper, *The Watchman*, and the Emancipation of Slavery in Jamaica." Association for Education in Journalism and Mass Communication, August, San Antonio. August, St. Louis, MO

2011: "Freedom of Press in the time of War and Imperialism: the trial of Roger Mais and *Public Opinion* in Jamaica." International Communication Association, May, Boston

2009: "Freedom of the Press under Attack during the 1938 Labor Risings in Jamaica: The Prosecution of the Publishers of the Jamaica Labour Weekly." International Communication Association, May, Chicago

2007: "George Worme's Prosecution for Criminal Libel in Grenada." International Communication Association, May, San Francisco

2005: "Humanitarian Law Project v. Ashcroft – National Security in the Homeland vs. Human Rights elsewhere." Association for Education in Journalism and Mass Communication, August, San Antonio, TX

2005: "Marcus Garvey's Trial for Seditious Libel in Jamaica." Association for Education in Journalism and Mass Communication, August, San Antonio. TX

2004: "Toward a Model for the New Jamaican Access Regime: A Comparison of how the Australian and U.S. courts have balanced the competing interests of Privacy and Public Access." International Communication Association, May, New Orleans

2003: R. Watson with B. Chamberlin: "A Framework for Electronic Access to Court Records in Florida." Association for Education in Journalism and Mass Communication, August, Kansas City

2003: R. Watson with C. Barclay: "Can Cross Burning be Constitutionally Proscribed? Sixty Years of Hate Speech Rulings culminating in *Black v. Virginia*." Association for Education in Journalism and Mass Communication, August, Kansas City

KELLY PAGE WERDER, PH.D.

Associate Professor
Zimmerman School of Advertising and Mass Communications
University of South Florida
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Tampa, FL 33620

EDUCATION

Doctor of Philosophy, Mass Communication, December 2002
Specialization: Public Relations
University of Florida, Gainesville, Fla.
Master of Science, Corporate and Professional Communication, December 1998
Specialization: Public Relations
Radford University, Radford, Va.
Bachelor of Arts, Communication Studies, June 1991
Major: Public Relations; Minor: Marketing
Virginia Polytechnic Institute and State University, Blacksburg, Va.

LEADERSHIP EXPERIENCE

Editor, International Journal of Strategic Communication, Routledge/Taylor & Francis.
January 2012 – present
Director of Graduate Studies, Zimmerman School of Advertising and Mass Communications,
University of South Florida August 2013 – August 2014; January 2010 – May 2011
Public Relations Sequence Head, Zimmerman School of Advertising and Mass
Communications, University of South Florida; Fall 2005 – Fall 2009
Faculty Advisor, Public Relations Student Society of America, Fall 2001 – Spring 2005

ACADEMIC EXPERIENCE

Associate Professor, Zimmerman School of Advertising and Mass Communications, University
of South Florida; June 2009 – present; tenured June 2009

- Assistant Professor, January 2003 – May 2009
- Instructor, August 2001 – December 2002

Graduate Teaching Assistant, College of Journalism and Communications, University of
Florida, Gainesville, Fla.; January 1999 – May 2001
Graduate Teaching Assistant, Department of Speech Communication, Radford University,
Radford, Va.; January 1997 – May 1998

TEACHING EXPERIENCE

University of South Florida, Tampa, Fla. (2001–present)

MMC 2100: Writing for the Mass Media
MMC 4420: Research Methods in Mass Communication
PUR 3000: Principle of Public Relations
PUR 3500: Public Relations Research
PUR 4100: Public Relations Writing
PUR 4101: Public Relations Design and Production
PUR 4401: Public Relations Issues, Practices and Problems
PUR 4801: Advanced Public Relations *

MMC 6401: Mass Communication Theory (Graduate)
PUR 6603: Strategic Communication Campaigns (Graduate)
PUR 6607: Strategic Communication Management (Graduate) *
MMC 6936: Strategic Communication Message Design (Graduate) *
University of Florida, Gainesville, Fla. (1999 –2001)
PUR 4100: Public Relations Writing

PUR 4103: Visual Communication
 PUR 4801: Public Relations Cases, Strategies and Tactics
 Radford University, Radford, Va. (1997-1998)
 SPCH 114: Public Speaking
 MSTD 206: Introduction to Writing for Media

PROFESSIONAL EXPERIENCE

Research Associate, Department of Speech Communication, Radford University, Radford, Va.
 January 1998 – August 1998
 Marketing & Public Relations Director, Internet Business Technologies, Inc., Blacksburg, Va.
 January 1996 – November 1996
 Owner, Page One Media Services, Blacksburg, Va.
 February 1992 – February 1997
 Publisher/Owner, ArtBeat Magazine, Blacksburg, Va.
 February 1992 – February 1995
 Account Manager, AdVantage Advertising, Marketing, and Design, Inc., Blacksburg, Va.
 September 1991 – February 1992

REFEREED JOURNAL ARTICLES

Werder, K. P. (2015). The integration of domains: Multidisciplinary approaches to strategic communication campaigns. *International Journal of Strategic Communication*, 9(2), 79-86.
 Werder, K. P., & Strand, K. (2011). Measuring student outcomes: An assessment of service learning in the public relations capstone course. *Public Relations Review*, 37(5), 478-484.
 Werder, K. P., & Holtzhausen, D. (2011). Organizational structures and their relationship with public relations management practices. *International Journal of Strategic Communication*, 5(2), 118-142.
 Werder, K. P., & Holtzhausen, D. (2009). An analysis of the influence of public relations leadership style on public relations strategy use and effectiveness. *Journal of Public Relations Research*, 21(4), 1-24.
 Werder, K. P. (2008). The effect of doing good: An experimental analysis of the influence of corporate social responsibility initiatives on beliefs, attitudes, and behavioral intention. *International Journal of Strategic Communication*, 2(2), 115-135.
 Werder, K. P. (2006). Responding to activism: An experimental analysis of public relations strategy influence on attributes of publics. *Journal of Public Relations Research*, 18(4), 335-356.
 Werder, K. P. (2005). An empirical analysis of the influence of perceived attributes of publics on public relations strategy use and effectiveness. *Journal of Public Relations Research*, 17(3), 217-266.

REFEREED BOOK CHAPTERS

Werder, K. P. (2015). A theoretical framework for strategic communication messaging. In D. Holtzhausen, & A. Zerfass (Eds.), *Handbook of Strategic Communication*. New York, NY: 2
 Routledge/Taylor & Francis.
 Förster, K., & Werder, K. P. (2012). Does message matter? Der Einfluss von Involvement und Werten auf die Wirksamkeit von Werbebotschaften. In H. Haas, & K. Lobinger (Eds.), *Qualitäten der Werbung - Qualitäten der Werbeforschung [Qualities of Advertising – Qualities of Advertising research]*. Cologne: Halem.

REFEREED PROCEEDINGS

Werder, K. P. & Förster, K. (2010). An experimental analysis of message strategy effect on consumer cognition in the U.S. and Austria. In P. Tirkkonen, A. Koski, M. Vos, & K. Tampere, (2010). *Communication in a Changing Society, Dynamics, Risks and Uncertainty*. Proceedings of the 12th

Euprera Congress.

Holtzhausen, D., & Werder, K. P. (2008). The emergence of new organizational structures and their relationship with public relations practice. In E. Invernizzi, T. M. Falconi, & S. Romenti (Eds.), *Institutionalising PR and Corporate Communication: Proceedings of the Euprera*

2008 Milan Congress (pp. 56-83). Upper Saddle River, N.J.: Pearson Prentice Hall.

Werder, K. P. (2006). Exploring the link between strategy and tactic: An analysis of strategic message content in news releases. Conference Proceedings of the Ninth Annual International Public Relations Research Conference. Institute for Public Relations.

EDITED PUBLICATIONS

Werder, K. P. (Ed.). (2015). *Strategic communication campaigns in a contemporary, networked, and digital society: Special Issue of the International Journal of Strategic Communication*. New York, NY: Routledge/Taylor & Francis.

OTHER PUBLICATIONS

Zerfass, A., Werder, K. P., & Holtzhausen, D. (2012). Editors' Introduction: Strategic Directions Revisited. *International Journal of Strategic Communication*, 6(3), 197-198.

Werder, K. P. (2012). *Strategic Communication for School Leaders*. Gulf Coast Partnership for a Job-

Embedded Principal Preparation Program. USF College of Education: Tampa, FL.

ACADEMIC SERVICE

Zimmerman School of Advertising and Mass Communications

Chair, Executive Committee; August 2012 – May 2013; Member, January 2010 – August 2012

Chair, Graduate Committee; August 2013 – August 2014; January 2010 – May 2011;

Member, 2008/09

Department Research Approver, USF Institutional Review Board; August 2009 – present

Chair, Research Compliance Committee; January 2005 – present

Chair, Advertising Faculty Search Committee; 2012/13

Member, ACEJMC Reaccreditation Self-Study Committee, August 2012 – January 2013

Member, Ad Hoc Governance Committee; May 2012 – May 2013

Member, Faculty Evaluation Committee (formerly STP); 2005/06, 2010/11, 2012/13

Chair, Public Relations Faculty Search Committee; 2005/06, 2006/07, 2009/10;

Member, 2011/12, 2012/13

Member, SMC Director Search Committee; 2009/10

Member, Doctoral Programming Committee; 2006 – 2008

Member, Curriculum Committee, 2005 – 2008

Member, Ad Hoc Convergence Committee, 2003 – 2006

Member, Undergraduate Committee, 2001 – 2006

USF College of Arts & Sciences

Member, College of Arts & Science Faculty Council; August 2010 – May 2013.

University of South Florida

Faculty Advisory Council, USF Office of Community Engagement and Partnerships;

August 2014 – present.

Member, USF Provost's Task Force on Community Engagement; August 2008 – May 2009.

Member, USF Media Relations Director Search Committee; Spring 2007.

Agenda Item: FL 107

USF Board of Trustees
March 6, 2018

Issue: B.S. Integrated Public Relations and Advertising – CIP 09.0900

Proposed action: Approval

Executive Summary: The proposed Bachelor of Science degree program in Integrated Public Relations and Advertising has been identified by the Florida Board of Governors as a Program of Strategic Emphasis (GAP Analysis) and will prepare students for leadership positions in the rapidly evolving fields of public relations, advertising, and integrated marketing communications. It meets workforce demand in Tampa Bay, Florida, and the United States. Based upon extensive experience with local, state, and national leaders in advertising and public relations, the faculty has developed curricula that will produce well-educated and highly skilled graduates ready to have an immediate impact. Specifically, graduates will understand the integrative nature of modern persuasive communication and be able to effectively incorporate analytics into creative and media planning decisions. This will allow them to assist clients with strategic marketing and corporate strategies having absolute accountability using quantifiable performance metrics needed in a vastly more complicated digital media environment.

Financial Impact: None. There will be no financial impact because faculty and resources for this new degree program already exist, instructing in two concentrations in an M.A. in Mass Communications degree program. Those two concentrations will be discontinued and resources from those two concentrations will be reallocated and used for this new degree program, with no net increase to the School's budget.

Strategic Goal(s) Item Supports:

- USF Tampa Strategic Plan Goal 1: Student Success

BOT Committee Review Date: ACE February 13, 2018

Supporting Documentation Online (*please circle*):

Yes

No

[BOG Proposal](#)

USF System or Institution specific: USF Tampa

Prepared by: Wayne Garcia, Director, Zimmerman School of Advertising and Mass Communications

INTRODUCTION**I. Program Description and Relationship to System-Level Goals**

- A. Briefly describe within a few paragraphs the degree program under consideration, including (a) level; (b) emphases, including majors, concentrations, tracks, or specializations; (c) total number of credit hours; and (d) overall purpose, including examples of employment or education opportunities that may be available to program graduates.**

The University of South Florida Tampa is creating a Bachelor of Science degree program in Integrated Public Relations and Advertising. The new program has been identified by the BOG as a Program of Strategic Emphasis (GAP Analysis) and will prepare students for leadership positions in the rapidly evolving fields of public relations, advertising, and integrated marketing communications. It meets workforce demand in Tampa Bay, Florida, and the United States. Based upon extensive experience with local, state, and national leaders in advertising and public relations, the faculty has developed curricula that will produce well-educated and highly skilled graduates ready to have an immediate impact. Specifically, graduates will understand the integrative nature of modern persuasive communication and be able to effectively incorporate analytics into creative and media planning decisions. This will allow them to assist clients with strategic marketing and corporate strategies having absolute accountability using quantifiable performance metrics needed in a vastly more complicated digital media environment.

Program Summary:

- (a) B.S. degree in Integrated Public Relations and Advertising (CIP 09.0900);
- (b) Undergraduates pursuing this degree must complete core courses and upper division courses in one or a combination of skill areas;
- (c) The proposed new degree for this major can be completed in 120 credit hours that include all General Education requirements, the core curriculum for this major, requirements for major electives, and general elective credit hours.

The curriculum includes:

General Education Requirements	36 credits
Required Major Core Courses	27 credits
Required Major Core Courses outside of the School	6 credits
Upper-Level Major Elective Courses	15 credits
General Electives	<u>36 credits</u>

Total=120 credits

d) Overall Purpose: This new degree program will produce a large number of students trained to fill an increasing local and statewide demand for entry and mid-level public relations and advertising professionals. Some examples of these workforce needs include (all growth projections through 2024 from the Florida Department of Economic Opportunity 2016-2024 Statewide Employment Projects.

<http://www.floridajobs.org/labor-market-information/data-center/statistical-programs/employment-projections>

- Marketing research analysts: +21.7%
- Meeting, Convention and Event Planners: +16.7%
- Marketing managers: +16.0%
- Advertising and Promotion Managers: +12.4%
- Public Relations and Fundraising Managers: +11.8%
- Public Relations Specialists: +11.6%
- Graphic Designers: +8.5%
- Advertising sales agents: +4.0%

Students graduating from USF with this degree may enter the workforce or continue their education in a variety of fields that might include Master's degree programs in Mass Communications, Public Relations, Advertising, Communications, Marketing, and Information, to name a few.

- B. Please provide the date when the pre-proposal was presented to CAVP (Council of Academic Vice Presidents) Academic Program Coordination review group. Identify any concerns that the CAVP review group raised with the pre-proposed program and provide a brief narrative explaining how each of these concerns has been or is being addressed.**

The pre-proposal was presented and approved at the May 2015 CAVP meeting. No concerns were put forward by the review group.

- C. If this is a doctoral level program please include the external consultant's report at the end of the proposal as Appendix D. Please provide a few highlights from the report and describe ways in which the report affected the approval process at the university.**

Not applicable; this is not a doctoral level program.

- D. Describe how the proposed program is consistent with the current State University System (SUS) Strategic Planning Goals. Identify which specific goals the program will directly support and which goals the program will indirectly support (see link to the SUS Strategic Plan on [the resource page for new program proposal](#)).**

The B.S. in Integrated Public Relations and Advertising specifically supports the current State University System (SUS) Strategic Planning goals to "Increase the Number of Degrees Awarded in STEM and Other Areas of Strategic Emphasis" and "Increase Community and Business Workforce." The B.S. in Integrated Public Relations and Advertising has been identified by the Board of Governors as a Program of Strategic Emphasis (Gap Analysis) under the CIP code 09.0900 and title of Public Relations, Advertising and Applied Communications. It will prepare students for leadership positions in the quickly evolving fields of public relations, advertising, and integrated marketing communications and meet workforce demand in Tampa Bay, Florida, and the United States.

- E. If the program is to be included in a category within the Programs of Strategic Emphasis as described in the SUS Strategic Plan, please indicate the category and the justification for inclusion.**

The Programs of Strategic Emphasis Categories:

1. Critical Workforce:
 - Gap Analysis

Please see the Programs of Strategic Emphasis (PSE) methodology for additional explanations on program inclusion criteria at [the resource page for new program proposal](#).

This degree specifically addresses Programs of Strategic Emphasis in terms of the current category of Economic Development (regional workforce demand) and the proposed category of Critical Workforce - Gap Analysis. The Integrated Public Relations and Advertising degree is designed to prepare students with the skills necessary to fulfill the needs of a critically under-supplied labor market, according to the Commission on Higher Education Access and Attainment's gap analysis examining labor projections versus related degree production. The degree is designed to produce a large number of students trained to fill local and statewide demand for entry and mid-level public relations and advertising growth area positions such as marketing research analysts, meeting and event planners, public relations specialists, marketing managers, advertising and promotion managers, public relations managers, graphic designers, and advertising sales agents.

F. Identify any established or planned educational sites at which the program is expected to be offered and indicate whether it will be offered only at sites other than the main campus.

The program will be offered primarily on the University of South Florida Tampa campus in classroom with some courses developed for online instruction.

INSTITUTIONAL AND STATE LEVEL ACCOUNTABILITY

II. Need and Demand

- A. Need: Describe national, state, and/or local data that support the need for more people to be prepared in this program at this level. Reference national, state, and/or local plans or reports that support the need for this program and requests for the proposed program which have emanated from a perceived need by agencies or industries in your service area. Cite any specific need for research and service that the program would fulfill.**

The rapid emergence of a host of new communication/advertising media and platforms have driven the need for new kinds of knowledge and analytical skills not typically seen in the preparation of students for traditional print and broadcast industries. In addition, the increasing role of brand and image in organizational success has driven the need for more seamless integration of public relations with advertising, thus requiring students with new skills and an expanded academic preparation.

The Florida Department of Economic Opportunity and the U. S. Department of Labor projections indicate an increasing need for university graduates with skills in using data analytics for media planning and implementation in the Tampa Bay region and in Florida.

State of Florida projections for Workforce Region 14 (Pinellas County) and Workforce Region 15 (Hillsborough County) from 2016 - 2024 show the intense need to provide this degree. Many present mass communications industries in "legacy" fields show strong projected employment declines. The state of Florida indicates projected 15.1% (Pinellas) and 8.4% (Hillsborough) decreases in the need for employees in the publishing industries, 6.6% (Pinellas) and 6.5% (Hillsborough) decreases in content distribution employees working at ISPs, and Web Search Portals, and a mere 3.8% (Pinellas) and 1.2% (Hillsborough) increase in employees working in Broadcasting.

Professionals in advertising and strategic communications fields, however, show strong growth. State of Florida projections Workforce Region 15 (Hillsborough) indicate a 12%-20% increase for advertising, public relations, and management analysts and those positions that require data analysis and the use of data for planning for advertising, public relations, and professional communications. This is precisely the workforce that this undergraduate degree aims to produce.

Likewise, U. S. Department of Labor projections (https://www.bls.gov/emp/ep_table_102.htm) indicate a 6.5% increase in media and management jobs that require data analysis and media planning and execution.

- B. Demand: Describe data that support the assumption that students will enroll in the proposed program. Include descriptions of surveys or other communications with prospective students.**

In a poll administered with the USF Zimmerman School of Advertising and Mass Communications' Advertising and Public Relations students, conducted by former Assistant Professor Jameson Hayes, Ph.D., 90% of respondents ($n = 138$) believed that an integrated approach to understanding media audiences is "Very Important" or "Extremely Important" for media professionals. In addition, 90% believed it is "Very Important" or "Extremely Important" to have an integrated approach to media content and distribution tools ($n = 125$) and 78% believed that it is "Very Important" or "Extremely Important" to understand data and use data analytic tools for public relations and advertising planning

($n = 110$). See Appendix F for details.

This poll, representing approximately 27% of Advertising and Public Relations students within the current degree concentrations, indicates a strong interest in a new curriculum that integrates the Advertising and Public Relations concentrations. The new program will replace the two concentrations (i.e., Advertising and Public Relations) in the existing B.A. in Mass Communications (CIP = 09.0102) that historically have accounted for about 50% of the undergraduate majors and degrees awarded within the School.

In Fall 2017, the School had 776 declared majors and 224 declared pre-majors waiting to meet the limited-access admissions requirements for the 09.0102 degree. Of these students, 33.4% have selected the Public Relations concentration, and 27% have selected the Advertising concentration. This represents 548 students presently in the concentrations and pre-majors destined to declare for those concentrations. This number has been constant for several years. From our student survey data and reports from academic advisors, the overwhelming majority of currently enrolled students have reported that they would switch to the proposed 09.0900 curriculum, if they were able to do so without accruing excess hours. From the 2008- 2009 academic year until the 2014-2015 academic year, the School averaged 59.7 degrees awarded in the Advertising concentration and 84.5 degrees awarded in the Public Relations concentration, totaling 144.2 degrees annually. The new major could see significant headcount increases from current trends since the new major will NOT be a limited-access major, as is the current Mass Communications degree.

- C. If substantially similar programs (generally at the four-digit CIP Code or 60 percent similar in core courses), either private or public exist in the state, identify the institution(s) and geographic location(s). Summarize the outcome(s) of communication with such programs with regard to the potential impact on their enrollment and opportunities for possible collaboration (instruction and research). In Appendix C, provide data that support the need for an additional program.**

Two SUS institutions offer programs under this CIP: Florida State University in Panama City and Florida International University in Miami. FSU's degree is a bachelor of science in professional communication, and FIU's is a bachelor of science in communication.

The FSU program is substantially different from our proposal and curricular overlap is only 8% of the proposed curriculum.

The FIU program instructs students in public relations and advertising and diverges to tracks for one or the other after a core curriculum is completed. It is also a limited-access program.

This additional program in the CIP is needed because of the BOG's previous identification of this CIP as a Gap Analysis, signifying that Florida universities continue to lag industry needs in graduates in this field.

- D. Use Table 1 in Appendix A (1-A for undergraduate and 1-B for graduate) to categorize projected student headcount (HC) and Full Time Equivalent (FTE) according to primary sources. Generally undergraduate FTE will be calculated as 30 credit hours per year and graduate FTE will be calculated as 24 credit hours per year. Describe the rationale underlying enrollment projections. If students within the institution are expected to change majors to enroll in the proposed program at its inception, describe the shifts from disciplines that will likely occur.**

The student enrollment figures in Table 1-A (see Appendix A) were developed assuming a combination of full-time and part-time undergraduate students resulting in an average 24 credit hours per year, and then dividing by the FTE undergraduate credit hours as defined above.

The proposed degree program will replace two concentrations (Advertising and Public Relations) in

the existing B.A. in Mass Communications (CIP = 09.0102), which historically have accounted for about 60% of the undergraduate majors and degrees awarded within the School.

From our student survey data and reports from academic advisors, the overwhelming majority of currently enrolled students have reported that they would switch to the proposed 09.0900 curriculum, if they were able to do so without accruing excess hours. Across a four-year program, we thus anticipate a steady demand of 370 headcount. This is consistent with the average unduplicated headcount for the two concentrations and the number of pre-majors selecting those concentrations for the past six academic years.

Projections for transfer students were generalized from the current student population of mass communications majors, which include 28.3% transfer from Florida community colleges, 60.2% FTIC at USF, and 11.3% transfer from out-of-state or private institutions. Historical data show that the 09.0102 major loses students to another major within the university at the same rate at which it draws students from other majors within USF. Initially the majority of students switching to the new curriculum will come from students who entered USF under a catalog eligible for the old 09.0102 concentrations in Advertising and Public Relations. Academic advisors suggest that there will be a small net influx of students from the Department of Communication and the Department of English who did not meet the previous limited-access admissions requirements.

- E. **Indicate what steps will be taken to achieve a diverse student body in this program. If the proposed program substantially duplicates a program at FAMU or FIU, provide, (in consultation with the affected university), an analysis of how the program might have an impact upon that university's ability to attract students of races different from that which is predominant on their campus in the subject program. The university's Equal Opportunity Officer shall review this section of the proposal and then sign and date Appendix B to indicate that the analysis required by this subsection has been completed.**

Table A. Comparison of Ethnicity among USF Colleges and Florida Residents

	Arts & Sciences		Social & Behavioral Sci.		Business		Education		Florida Residents 2010
White	8001	48%	1449	57%	2728	46%	1372	61%	62%
Black	1843	11%	320	13%	461	8%	253	11%	15%
Asian	1250	7%	60	2%	328	5%	51	2%	>3%
Hispanic	3416	20%	497	20%	1000	17%	327	14%	20%

Table B. Ethnicity in Current Mass Communications Major in comparison to Arts and Sciences and Florida populations

Ethnicity	Arts & Sciences		Current Mass Communications undergraduate students		Florida Residents 2010
White	8001	47%	415	52%	62%
Black	1843	12%	93	12%	15%
Asian	1250	8%	20	2%	>3%
Hispanic	3416	20%	173	22%	20%
Non-Resident Alien and Other	2157	13%	100	12%	

*Data obtained from USF Infocenter Fall 2017 Preliminary count.

Step 1: A sample baseline of ethnicity of the major colleges at USF is shown in the above table A. Table B demonstrates the ethnicity of the student population in our current program as of fall 2015. The mass communications major attracts a diverse group of students. We expect that diversity numbers will continue to rise when transitioning to a more analytical B.S. in Integrated Public Relations and Advertising degree as opposed to the B.A. degree.

Step 2: The importance of a diverse faculty, staff and student body is valued. Active participation in recruiting consistent with "One Florida" is done and the recruitment guidelines of the College of Arts and Sciences are followed. Representatives administering the B.S. in Integrated Public Relations and Advertising program will participate in "USF Stampede for Success," a diverse recruitment event targeting high school sophomores.

Step 3: The director of this program will work with the Office of Admissions in identifying high schools in the Tampa Bay area with high numbers of underrepresented minority students where steps can be taken to update high school counselors on the existence of this new degree and to encourage participation in appropriate course preparation.

Step 4: The director will meet with personnel from community college communications and marketing programs to develop and implement programs meant to increase underrepresented groups and the diversity of our student population.

Step 5: It is anticipated that graduates of this program will become our best recruiters of all underrepresented students.

III. Budget

- A. Use Table 2 in Appendix A to display projected costs and associated funding sources for Year 1 and Year 5 of program operation. Use Table 3 in Appendix A to show how existing Education & General funds will be shifted to support the new program in Year 1. In narrative form, summarize the contents of both tables, identifying the source of both current and new resources to be devoted to the proposed program. (Data for Year 1 and Year 5 reflect snapshots in time rather than cumulative costs.)**

Table 2 (see Appendix A) shows the projected costs for the new degree program. Due to the fact that students take the bulk of their courses for the major starting in their sophomore through senior years, costs for Year 1 are quite low. As each successive academic year requires more courses to be taught for the new degree, fewer courses will be required for teach-out of the current degree. By Year 5, all public relations and advertising faculty will be reallocated to the new program.

The new degree program requires 48 hours in the major, which is an increase from 37 hours in the current Mass Communications B.A. (The current bachelor's degree requires 124 credit hours overall, which is being lowered to 120 hours in the new degree.) The additional instructional hours can be accomplished without additional faculty by redesigning some courses to accommodate additional students, placing others online, and using the new courses specifically designed for this major to provide new hands-on skills instruction for larger numbers of students. The curriculum would continue the school's use of effective pedagogical approaches to learning – including service learning and high-impact practices generally – instead of traditional lecture-lab approaches.

The Zimmerman School anticipates a generally stable undergraduate population as incoming students migrate from the current concentrations in public relations and advertising to the new integrated degree program. Current resources will be reallocated to match student demand.

- B. Please explain whether the university intends to operate the program through continuing education, seek approval for market tuition rate, or establish a differentiated graduate-level tuition. Provide a rationale for doing so and a timeline for seeking Board of Governors' approval, if appropriate. Please include the expected rate of tuition that the university plans to charge for this program and use this amount when calculating cost entries in Table 2.**

Not applicable.

- C. If other programs will be impacted by a reallocation of resources for the proposed program, identify the impacted programs and provide a justification for reallocating resources. Specifically address the potential negative impacts that implementation of the proposed program will have on related undergraduate programs (i.e., shift in faculty effort, reallocation of instructional resources, reduced enrollment rates, greater use of adjunct faculty and teaching assistants). Explain what steps will be taken to mitigate any such impacts. Also, discuss the potential positive impacts that the proposed program might have on related undergraduate programs (i.e., increased undergraduate research opportunities, improved quality of instruction associated with cutting-edge research, improved labs and library resources).**

This new program consolidates two existing concentrations under the Mass Communications B.A. degree (CIP = 09.0102). Faculty members who taught in those concentrations will begin to teach courses in the new major as the school "teaches out" the old concentrations. Therefore, no need for additional allocation of resources is anticipated.

- D. Describe other potential impacts on related programs or departments (e.g., increased need for general education or common prerequisite courses, or increased need for required or elective courses outside of the proposed major).**

The proposed curriculum includes two required courses that are housed in other USF units: one General Education lower-level core course and one upper-level elective course. We expect only a marginal increase in enrollments in the upper-level elective, MAR 3023 Basic Marketing, as current Advertising and Public Relations students are already required to take it. The Muma College of Business has concurred (See Appendix E). The new outside core course required is STA 2023 Intro to Statistics I, a General Education course that is already a large-enrollment course at USF. We also Mathematics department concurrence on using this course, as well.

- E. Describe what steps have been taken to obtain information regarding resources (financial and in-kind) available outside the institution (businesses, industrial organizations, governmental entities, etc.). Describe the external resources that appear to be available to support the proposed program.**

An assessment board of advertising and public relations professionals will be established for the Integrated Public Relations and Advertising program with regional representatives of agencies and nonprofits. There has been a great deal of interest in the program from area practitioners interested in internship opportunities and offers of participation in onsite education (e.g., workshops) for our students. The American Advertising Federation Tampa Bay has shown particular interest in the integrated approach that will better train students to take on multifaceted positions in the mid-sized Tampa market. A portion of the Program Director's time will involve this outreach to advertising and public relations organizations to connect students with the community. Guidance from practicing advertising and public relations professionals will be crucial in our efforts to continue shaping an effective program that

provides more real-world opportunities for our students.

IV. Projected Benefit of the Program to the University, Local Community, and State

Use information from Tables 1 and 2 in Appendix A, and the supporting narrative for “Need and Demand” to prepare a concise statement that describes the projected benefit to the university, local community, and the state if the program is implemented. The projected benefits can be both quantitative and qualitative in nature, but there needs to be a clear distinction made between the two in the narrative.

Students trained in this major will be able to fulfill demand in Tampa Bay and the State of Florida for professionals who can use an integrated, analytical approach to public relations, advertising and strategic communications. From a quantitative standpoint, the Board of Governors has placed this major on its Gap Analysis list, meaning that there is a projected gap between the positions that will be open in the state and the number of qualified graduates who can fill them. According to Commission on Higher Education Access and Attainment, the annual undersupply of graduates entering the workforce as public relations specialists is 116, while job openings for all media and communications bachelor-degree jobs in Florida will total 1,355 annually (Nov. 2013, “Aligning Workforce and Higher Education for Florida’s Future”). Faculty are informed by our industry partners in the Tampa Bay community that graduates need a broader range of communications skills and cutting-edge digital/analytical skills to be competitive in the world of integrated strategic messaging and media.

V. Access and Articulation – Bachelor’s Degrees Only

- A. If the total number of credit hours to earn a degree exceeds 120, provide a justification for an exception to the policy of a 120 maximum and submit a separate request to the Board of Governors for an exception along with notification of the program’s approval. (See criteria in Board of Governors Regulation 6C-8.014)**

Not applicable; the B.S. in Integrated Public Relations and Advertising degree program will not exceed 120 hours.

- B. List program prerequisites and provide assurance that they are the same as the approved common prerequisites for other such degree programs within the SUS (see link to the Common Prerequisite Manual on [the resource page for new program proposal](#)). The courses in the Common Prerequisite Counseling Manual are intended to be those that are required of both native and transfer students prior to entrance to the major program, not simply lower-level courses that are required prior to graduation. The common prerequisites and substitute courses are mandatory for all institution programs listed, and must be approved by the Articulation Coordinating Committee (ACC). This requirement includes those programs designated as “limited access.”**

If the proposed prerequisites are not listed in the Manual, provide a rationale for a request for exception to the policy of common prerequisites. NOTE: Typically, all lower-division courses required for admission into the major will be considered prerequisites. The curriculum can require lower-division courses that are not prerequisites for admission into the major, as long as those courses are built into the curriculum for the upper-level 60 credit hours. If there are already common prerequisites for other degree programs with the same proposed CIP, every effort must be made to utilize the previously approved prerequisites instead of recommending an additional “track” of prerequisites for that CIP. Additional tracks may not be approved by the ACC, thereby holding up the full approval of the degree program. Programs will not be entered into the State University System Inventory until any exceptions to the approved common prerequisites are approved by the ACC.

The ACC does not list any common prerequisites for this CIP major.

- C. If the university intends to seek formal Limited Access status for the proposed program, provide a rationale that includes an analysis of diversity issues with respect to such a designation. Explain how the university will ensure that Florida College System transfer students are not disadvantaged by the Limited Access status. NOTE: The policy and criteria for Limited Access are identified in Board of Governors Regulation 6C-8.013. Submit the Limited Access Program Request form along with this document.**

USF does not intend to seek formal Limited Access status for this proposed program.

- D. If the proposed program is an AS-to-BS capstone, ensure that it adheres to the guidelines approved by the Articulation Coordinating Committee for such programs, as set forth in Rule 6A-10.024 (see link to the Statewide Articulation Manual on [the resource page for new program proposal](#)). List the prerequisites, if any, including the specific AS degrees which may transfer into the program.**

Not applicable; the Integrated Public Relations and Advertising degree program is not an AS-to-BS capstone program.

INSTITUTIONAL READINESS

VI. Related Institutional Mission and Strength

- A. Describe how the goals of the proposed program relate to the institutional mission statement as contained in the SUS Strategic Plan and the University Strategic Plan (see link to the SUS Strategic Plan on [the resource page for new program proposal](#)).**

The intention of this program proposal is to restructure and transform the current USF Zimmerman School of Advertising and Mass Communications' curriculum in a manner that is consistent with USF's, the USF Tampa's, the SUS-BOG's Strategic Plans, as well as student and workforce demands.

The proposed program will help meet USF Tampa's goals of preparing global citizens via the study of global digital strategic communications systems (Goal 1), preparing students and focusing faculty on innovating in the integration of advertising and public relations (Goal 2), and increasing partnerships on and off campus to foster a stronger economy as the result of producing needed workers and innovative strategic communications solutions (Goal 3).

The proposed degree program also supports the SUS's 2025 Strategic Plan (revised Nov. 6, 2014), first and foremost because it is on the Programs of Strategic Emphasis list (effective fall 2014) in the category of GAP Analysis. The proposed program also furthers the SUS's Performance Based Modeling criteria by increasing the "Percent of Bachelor's Graduates Employed and/or Continuing their Education Further." We also believe the new program will further the SUS's general strategic goals in the following:

- Increase Degree Productivity and Program Efficiency
- Strengthen Quality & Reputation of Academic Programs and Universities
- Strengthen Quality & Reputation of Scholarship, Research, and Innovation
- Increase Community and Business Engagement

Specifically, this proposal recognizes that persuasive, strategic communication has evolved from a rather elementary division of paid (i.e., advertising) and unpaid (i.e., public relations) media and tactics based primarily upon the written word into a heavily strategic and analytics-based enterprise where all messaging elements are integrated from the earliest planning and that resulting tactics deliver a measurable return on marketing investment for the client. Further, where once mass communications

graduates needed primarily to know how to write narratives, today's graduates must simultaneously use new technology to implement the content across multiple platforms and create prose that is pleasing to both the human reader and the algorithms of search engines. Restructuring current Zimmerman School of Advertising and Mass Communications concentrations (Advertising and Public Relations) will enhance student market prospects, better serve market partners in Tampa Bay and Florida, and engender faculty research in audience analytic skills that have been identified in the Board of Governor's Strategic Analysis as a "GAP" program.

Converting the current B.A. in Mass Communications (CIP 09.0102), with its emphasis on humanities and liberal arts, to Integrated Public Relations and Advertising (CIP 09.0900) will emphasize computational, strategic, statistical, and systems thinking that are consistent with the proposed curriculum for the B.S. degree. This curriculum should attract students who are familiar with and embrace statistics and media analytics.

Enrollment in this program will come directly from the termination of the existing concentrations (09.0102). Program growth is expected over the coming five years; however, this is anticipated to come from a diverse population of out-of-state students newly recruited to USF, as well as existing USF students who chose alternative majors when they did not meet the limited-access requirements of the current 09.0102 BA major. The restructuring of this program will benefit USF in the following manner:

- Undergraduate students will be prepared for current and future leadership positions in strategy-based persuasive communication, digital media content creation and analysis, and media analytics;
- Focus on B.S. requirements will attract students with analytic and systems perspectives on content creation and distribution;
- Focus on statistical requirements will attract students with interest in media analytics;
- The proposal curriculum would attempt to achieve 20% online capability;
- Focus on digital media with B.S. requirements should be of additional interest to international students
- This restructured program is designed to integrate with current and planned internship and employment models being used by traditional advertising and public relations agencies as well as growing digital and technology-based agencies in Tampa Bay, Florida, and globally.

B. Describe how the proposed program specifically relates to existing institutional strengths, such as programs of emphasis, other academic programs, and/or institutes and centers.

The Integrated Public Relations and Advertising degree programs leverages the strengths of two existing USF concentrations in the Zimmerman School of Advertising and Mass Communications. Advertising has been an emphasis and focus of the School for nearly a decade, with the assistance of Trustee Jordan Zimmerman, creating a world-class curriculum that leverages his agency's experience and mentorship. The Zimmerman Advertising Program -- a partnership with the Muma College of Business -- is a unique outgrowth of that involvement and direction. Similarly, the Tampa Bay area is rich with graduates of the program's public relations concentration and provides professional guidance and teaching for our students. As the nation's 11th largest media market boasting national corporate presence (Home Shopping Network's studios, Nielsen) and major league franchises in the NFL, NHL, MLB and other smaller sports, Tampa Bay is full of opportunities for partnerships and internships for students in the PR-advertising fields.

C. Provide a narrative of the planning process leading up to submission of this proposal. Include a chronology in table format of the activities, listing both university personnel directly involved and external individuals who participated in planning. Provide a timetable of events necessary for the implementation of the proposed program.

In 2013, as the Zimmerman School was being examined for re-accreditation, the College Dean moved the School in a more digital, modern direction and let accreditation lapse for that reason (the accrediting

body had restrictions that made it difficult to fully modernize the curriculum). In 2103-14, faculty evaluated the best way to proceed before deciding on a new major program that integrated strengths already in the School and sought a new CIP that was on the Board of Governor's Programs of Strategic Importance list. In Fall 2014, a team of PR and advertising faculty wrote a pre-proposal and, ultimately, proposal and curriculum, for a new, integrated major.

Planning Process

Date	Participants	Planning Activity
Spring 2013	College Dean Eric Eisenberg and Interim Director, various faculty	College Dean calls for updating curriculum toward a more integrated, broader approach that emphasizes analytics and digital media
October 2014	Interim Director, Associate Director Wayne Garcia and various faculty	A pre-proposal for this new major is started, in conjunction with PR and Advertising faculty
February-March 2015	College Associate Dean Potter, Dean Eisenberg, Undergraduate Council, Zimmerman School Faculty	Pre-proposal is approved by faculty, College Dean, Undergraduate Council
February 2015	APPCC Members	Pre-proposal approved
April 2015	CAVP	Successful review of the Pre-proposal for CIP 09.0900 by the CAVP
Summer 2015	Various faculty	Writing proposal and creating and editing courses
October 16, 2015	Zimmerman School Undergraduate Committee and full faculty	New Degree Program Proposal approved by unanimous votes
Nov. 28, 2016	Dr. Robert Potter, Mr. Wayne Garcia	Approval of initial submission by Undergraduate Council
Feb. 6, 2017	Dr. Robert Potter, Mr. Wayne Garcia, Dr. Artemio Ramirez	On APAC agenda, proposal placed on hold after review
October 9, 2017	Dr. Robert Potter, Mr. Wayne Garcia	Approval of resubmission by Undergraduate Council

Events Leading to Implementation

Date	Implementation Activity
Fall 2017	Complete all approvals and create working group within the School to implement new major and plan teach-out of old
Spring 2018	Selected faculty given off-loads to prepare new course preparations
Fall 2018	New Integrated Public Relations And Advertising Major is implemented and listed in the undergraduate catalog

VII. Program Quality Indicators - Reviews and Accreditation

Identify program reviews, accreditation visits, or internal reviews for any university degree programs related to the proposed program, especially any within the same academic unit. List all recommendations and summarize the institution's progress in implementing the recommendations.

The Zimmerman School graduate and undergraduate programs were reviewed in 2016 as part of USF Tampa's academic program review process. The recommendations regarding the undergraduate program included: Hiring a new director; aggressively advising undergraduates as to internships and study abroad earlier; creating a professional Advisory Board; hiring a staff member to assist with data collection for assessment and alumni contacts; and working with other USF departments and colleges to create interdisciplinary opportunities.

A search firm has been retained to assist in hiring a new director, who is expected to be in place by the Fall of 2018. That new director will have the latitude and funding to hire two new "impact" tenure-line faculty members, one of whom will teach in this new undergraduate program.

Working with the USF Alumni Association, the School has created a Mass Communications chapter for alumni. The undergraduate assessment plan calls for professional involvement in evaluating student work. Professional input for this new program also was sought as part of this process, yielding very positive feedback on the proposed degree.

Undergraduates are advised earlier about internship opportunities, and the unit is working with Education Abroad for a "road map" to include core courses as study abroad offerings. Presently, nearly 200 undergraduate students register for internships for credit.

Finally, the School is collaborating with the Department of Communication and its School of Social Sciences colleagues on new interdisciplinary General Education courses.

VIII. Curriculum

A. Describe the specific expected student learning outcomes associated with the proposed program. If a bachelor's degree program, include a web link to the Academic Learning Compact or include the document itself as an appendix.

The [Academic Learning Compact](#) and specific learning outcomes associated with this proposal are in line with the nature of the industry and the requirements of the State of Florida. The proposed curriculum has been mapped across six goals outlined below.

Goal 1: Discipline Specific Knowledge and Skills: Law and Ethics of Applied Communication

Student Learning Outcomes

Upon completion of the undergraduate program in Integrated Public Relations and Advertising, students will:

- Name major legislative and judicial constraints on commercial speech
- Interpret planned communication tactics with respect to restrictions on commercial speech
- Identify professional ethical norms for public relations, advertising, and applied communication

Goal 2: Discipline Specific Knowledge and Skills: Mass Communications and Society

Student Learning Outcomes

Upon completion of the undergraduate program in Integrated Public Relations and Advertising students will be able to:

- Demonstrate an understanding of gender, race, ethnicity, sexual orientation, and diversity in democratic society in relation to public relations, advertising, and applied communication
- Demonstrate an understanding of diversity of peoples and cultures and impact of public relations, advertising, and applied communication in global society

Goal 3: Critical Thinking: Thinking Critically, Creatively, and Independently

Student Learning Outcome

Upon completion of the undergraduate program in Integrated Public Relations and Advertising, students will be able to:

- Analyze a communication environment from an organization's perspective
- Identify and prioritize an organization's relevant stakeholders and publics
- Develop message strategies to advance an organization's communication goals
- Construct media strategies necessary to accomplish communication goals within allocated budget
- Project return on advertising investment from a planned communication campaign
- Evaluate communications campaigns for effectiveness with respect to campaign objectives

Goal 4: Critical Thinking: Applying Critical Thinking to Research and Presentations

Student Learning Outcome

Upon completion of the undergraduate program in Integrated Public Relations and Advertising, students will be able to:

- Demonstrate numeracy and use statistical concepts
- Synthesize communication research findings into meaningful executive summaries
- Conduct research and evaluate information by methods appropriate to communications professionals
- Create creative concepts and test them on audiences
- Develop and perform persuasive presentations to potential and existing clients

Goal 5: Communications Skills: Writing Effectively as a Public Relations, Advertising, and Applied Communication Professional

Student Learning Outcome

Upon completion of the undergraduate program in Integrated Public Relations and Advertising, students will be able to:

- Write accurately, concisely, and clearly in forms and styles appropriate for multiple applied communication audiences and purposes
- Write fundamental computer programming code and apply a wide range of coding uses for Public Relations, Advertising, and Applied Communication purposes
- Demonstrate professional or presentational speaking skills and use appropriate presentational tools

Goal 6: Communications Skills: Communicating Effectively as a Public Relations, Advertising, and Applied Communication Professional

Student Learning Outcomes

Upon completion of the undergraduate program in Integrated Public Relations and Advertising, students will be able to:

- Apply communications and digital media tools and technologies appropriate for public relations, advertising, and applied communication professionals
- Employ web technologies for communicating spoken and written word, sounds, still and moving images to increasingly to diverse and global audiences
- Speak clearly and persuasively and use appropriate communications and media presentation technologies

B. Describe the admission standards and graduation requirements for the program.

Admission standards are the same as those for admission to USF Tampa. Graduation standards must meet those minimum standards of B.S. degrees in the College of Arts and Sciences as follows: 2.0 GPA overall. Graduation requirements are: 120 credit hours of coursework with 48 hours in the Integrate Public Relations and Advertising major, in addition to the University's General Education requirements, and 42 minimum upper-level hours, with 30 minimum hours in residency.

C. Describe the curricular framework for the proposed program, including number of credit hours and composition of required core courses, restricted electives, unrestricted electives, thesis requirements, and dissertation requirements. Identify the total numbers of semester credit hours for the degree.

Students must complete 120 course hours, including 27 hours in core requirements in the school; 6 hours of core requirements from other departments, STA 2023 Introduction to Statistics I and MAR 3023 Basic Marketing; and 15 additional hours of electives from courses in the Zimmerman School of Advertising and Mass Communications. The remaining 120 hours is composed of General Education requirements and upper-level electives outside the Zimmerman School.

- D. Provide a sequenced course of study for all majors, concentrations, or areas of emphasis within the proposed program.**

REQUIREMENTS FOR THE MAJOR IN INTEGRATED PUBLIC RELATIONS AND ADVERTISING

TOTAL MAJOR HOURS: 48

Major requirements for the B.S. Degree:

Major Core (33 hours)

Required Program Core Courses (27 credit hours)

- Take one of the following:
 - MMC 2100 Writing for the Mass Media
 - ADV 2214 Graphic Programs in Mass Communications
- ADV 3008 Introduction to Advertising
- PUR 3000 Principles of Public Relations
- ADV 3101 PR-Advertising Creativity (course name change proposal)
- ADV 3300 PR-Advertising Media Strategy (course name change proposal)
- PUR 3500 PR-Advertising Research (course name change proposal)
- MMC 3602 Mass Communications and Society
- MMC 4211 Media Law and Ethics
- Take one of the following:
 - ADV 4800 Advertising Campaigns
 - PUR 4801 Advanced Public Relations

Other Major Core Requirements (6 credit hours):

The following course is required outside the School to complete degree requirements:

- MAR 3023 Basic Marketing
- STA 2023 Introductory Statistics I

Major Electives (15 hours)

Choose 15 credit hours of coursework from the following list:

- ADV 3200 Advertising Design
- ADV 4204 Advanced Advertising Creativity
- ADV 4301 Advanced Media Strategy
- ADV 4310 Digital Media
- ADV 4600 Advertising Management
- ADV 4710 Portfolio Building
- MMC 4936 Special Topics in Mass Communications Studies
- ADV 4940 Internship
- PUR 4100 Writing for Public Relations
- PUR 4101 Public Relations Design and Production
- PUR 4401 Public Relations: Issues, Practices, and Problems
- PUR 4507 Persuasion in Digital Media
- RTV 4321 Electronic Field Production
- VIC 3001 Introduction to Visual Communications
- Or three (3) credits from the Zimmerman School of Advertising & Mass Communications curriculum outside of those above, with advisor approval

SAMPLE SCHEDULE FOR FTIC STUDENT

Freshman Fall	<ul style="list-style-type: none"> • MMC 3602 Mass Comm and Society
Freshman Spring	<ul style="list-style-type: none"> • MMC 2100 Writing for Mass Media OR • ADV 2214 Graphic Programs in Mass Communications
Sophomore Fall	<ul style="list-style-type: none"> • STA 2023 Introductory Statistics I • ADV 3008 Introduction to Advertising • PUR 3000 Principles of Public Relations • ADV 4940 Internship (1)
Sophomore Spring	<ul style="list-style-type: none"> • ADV 3101 PR-Advertising Creativity (course name change proposal) • ADV 3300 PR-Advertising Media Strategy (course name change proposal) • PUR 3500 PR-Advertising Research (course name change proposal)
Summer	<ul style="list-style-type: none"> • ADV 4940 Internship (3) or Education Abroad
Junior Fall	<ul style="list-style-type: none"> • 2 Mass Comm electives • MAR 3023 Basic Marketing
Junior Spring	<ul style="list-style-type: none"> • 2 Mass Comm electives • ADV 4940 Internship (1)
Senior Fall	<ul style="list-style-type: none"> • MMC 4211 Media Law and Ethics • 1 Mass Comm elective
Senior Spring	<p>Take one of the following:</p> <ul style="list-style-type: none"> • ADV 4800 Advertising Campaigns • PUR 4801 Advanced Public Relations

SAMPLE SCHEDULE FOR TRANSFER STUDENT

Summer B	<ul style="list-style-type: none"> • MMC 3602 Mass Comm and Society • MMC 2100 Writing for Mass Media <p style="text-align: center;">OR</p> <ul style="list-style-type: none"> • ADV 2214 Graphic Programs in Mass Communications
Junior Fall	<ul style="list-style-type: none"> • MMC 4211 Media Law and Ethics <ul style="list-style-type: none"> • STA 2023 Introductory Statistics I • ADV 3008 Introduction to Advertising • PUR 3000 Principles of Public Relations
Junior Spring	<ul style="list-style-type: none"> • ADV 3101 PR-Advertising Creativity (course name change proposal) • ADV 3300 PR-Advertising Media Strategy (course name change proposal) • PUR 3500 PR-Advertising Research (course name change proposal)
Summer	<ul style="list-style-type: none"> • ADV 4940 Internship (3) or Education Abroad
Senior Fall	<ul style="list-style-type: none"> • 3 Mass Comm electives • MAR 3023 Basic Marketing
Senior Spring	<ul style="list-style-type: none"> • 2 Mass Comm electives <p>Take one of the following:</p> <ul style="list-style-type: none"> • ADV 4800 Advertising Campaigns • PUR 4801 Advanced Public Relations

E. Provide a one- or two-sentence description of each required or elective course.**ADV 2214 Graphic Programs in Mass Communications (3)**

Introduction to visual communication theory and applications, emphasizing the history, principles, and practices of design in mass media. Students will apply principles to develop and construct media content for global audiences. Repeat up to 9 credits.

ADV 3008 Introduction to Advertising (3)

A study of the structures, functions, and persuasive language of advertising in mass media with attention to social, political, economic, and legal aspects.

ADV 3200 Advertising Design (3)

Application of graphic design principles to various areas of advertising. Combining visual and verbal elements effectively.

ADV 3805 PR-Advertising Creativity (3) (renamed course proposal)

Study of the creation of advertising and public relations concepts and messages across media platforms. Restricted to majors only.

ADV 4204 Advanced Advertising Creativity (3)

Focused on producing advertising messages, the curriculum integrates: ethics, branding, consumer insight, message strategy, concepting, persuasion, copywriting, design, and presentations. Students learn to execute effective advertising messages.

ADV 4301 Advanced Media Strategy (3)

Emphasizing decision making and critical thinking, this advanced course prepares students for the complexities of advertising media planning, implementation, and evaluation.

ADV 4310 Digital Media (3)

This course focuses on the impact of new communication technologies on consumer behavior and advertising practice. Students will learn the nature of digital media options and how to incorporate them into advertising planning.

ADV 4600 Advertising Management (3)

Application of analytical planning concepts to advertising planning and decision-making. Case study method used to explore advertising and promotional programs; media and creative strategies; consumer, retail, industrial, and public service applications.

ADV 4710 Portfolio Building (3)

This course goes beyond the basics of copy and layout to develop a broader understanding of the creative advertising process. It stresses creativity and organizational ability in portfolio building, along with technical skills in portfolio production.

ADV 4800 Advertising Campaigns (3)

Practical experience outside the classroom where the student works for academic credit under the supervision of a professional practitioner. Periodic written and oral reports to the faculty member coordinating the study.

MMC 2100 Writing for the Mass Media (3)

This course offers a comprehensive background in strategically analyzing, organizing, and presenting information across various written, oral, and visual media applicable in digital media, advertising and public relations practice.

ADV 3300 PR-Advertising Media Strategy (3) (renamed course proposal)

Problems, techniques, strategy of media research, planning, budgeting and effective utilization of media in communication plans including advertising media planning and media relations.

PUR 3500 PR-Advertising Research (3) (renamed course proposal)

An integrative overview of the theory and practice of quantitative and qualitative research methods as applicable to public relations and advertising. Emphasis on the acquisition, analysis, evaluation, and reporting of primary and secondary data.

MMC 3602 Mass Communications and Society (3)

A survey of the history, theory, processes, and philosophy of mass communications and the mass media in the United States, and their relationship to the other major institutions of society in domestic and global contexts.

MMC 4211 Media Law and Ethics (3)

A study of historical and constitutional backgrounds of freedom and control of expression, statutory enactments, major court decisions and administrative rulings which affect print media, telecommunications, advertising, public relations, and new media and their intersection with the fundamental principles and philosophies of ethics in mass communications professions.

MMC 4936 Special Topics in Mass Communications Studies (1-3)

Courses designed to meet current or specific topics of interest to instructors and students.

ADV 4940 Internship (1-3)

Students work for an employer within the field of mass communication to practice skills and apply knowledge.

ADV 2214 Graphic Programs in Mass Communications (3)

Introduction to visual communication theory and applications, emphasizing the history, principles, and practices of design in mass media. Students will apply principles to develop and construct media content for global audiences. Repeat up to 9 credits.

PUR 3000 Principles of Public Relations (3)

The underlying theory and professional practice of public relations within corporate and institutional structures and its vital role in society; ethical standards of practice, and relationships of the practice to the public media; public relations problem-solving process.

PUR 4100 Writing for Public Relations (3)

Techniques for creating effective written public relations communications to achieve organizational goals, including news releases, proposal letters, broadcast scripts, and memos. Exercises based on case study scenarios.

PUR 4101 Public Relations Design and Production

Theoretical and practical applications of design for public relations publications. Design software. Study of visual design, page architecture, typography, color and illustrations. Integration of design elements in the design of different types of public relations publications.

PUR 4401 Public Relations: Issues, Practices, and Problems (3)

The theory of public relations practice and its application in the real world. The role of the public relations practitioner in business, government, and social institutions, and the nature of specialized areas of the practice. Identification of public issues, analysis of potential impact on organizations and development of strategies to deal with them successfully and responsibly. Communication techniques and trends.

PUR 4507 Persuasion in Digital Media (3)

A case-based, writing intensive course designed to prepare students to integrate subject matter throughout the curriculum to think critically and strategically about solving public relations and advertising problems.

PUR 4801 Advanced Public Relations (3)

As final course in Public Relations sequence, it involves intensive study of counseling and problem-solving techniques used in professional practice. Analysis of case studies and preparation of complete Public Relations program. Extensive reading in the literature of contemporary practice.

RTV 4320 Electronic Field Production (3)

Advanced producing, scripting, lighting, camera, and editing for video and news production. Introduction to computer editing and graphics.

VIC 3001 Introduction to Visual Communications (3)

PR: MMC 2100 and MMC 3602. Survey of visual communication theory, techniques and contemporary application in the visual media. Critical examination of visual communication in newspapers, magazines, television, motion pictures and new media

MAR 3023 Basic Marketing (3)

Survey of the marketing of goods and services within the economy. Attention is paid to the impact of marketing on other functional areas of business as well as society.

STA 2023 Introductory Statistics I (3)

Descriptive and Inferential Statistics; Principles of Probability Theory, Discrete and Continuous Probability Distributions: Binomial Probability Distribution, Poisson Probability Distribution, Uniform Probability Distribution, Normal Distribution and more.

- F. For degree programs in the science and technology disciplines, discuss how industry-driven competencies were identified and incorporated into the curriculum and indicate whether any industry advisory council exists to provide input for curriculum development and student assessment.**

Not Applicable.

- G. For all programs, list the specialized accreditation agencies and learned societies that would be concerned with the proposed program. Will the university seek accreditation for the program if it is available? If not, why? Provide a brief timeline for seeking accreditation, if appropriate.**

The primary professional accrediting body for this program is the Accrediting Council on Education in Journalism and Mass Communications (ACEJMC). In close consultation with the Dean of the College of Arts and Sciences and USF leadership, the Zimmerman School voluntarily withdrew from ACEJMC in 2013 to make curricular changes that would have been impermissible under ACEJMC's older, legacy model of mass communications education. This follows a trend of the leading programs of mass communications voluntarily withdrawing from ACEJMC (e.g., Ohio State University, University of Texas at Austin, University of Wisconsin-Madison). As ACEJMC updates its criteria to better reflect that modern media environment and changes in media education in a large research university, the members of the school faculty have expressed they are open to exploring rejoining that body.

- H. For doctoral programs, list the accreditation agencies and learned societies that would be concerned with corresponding bachelor's or master's programs associated with the proposed program. Are the programs accredited? If not, why?**

Not Applicable.

- I. Briefly describe the anticipated delivery system for the proposed program (e.g., traditional delivery on main campus; traditional delivery at branch campuses or centers; or nontraditional delivery such as distance or distributed learning, self-paced instruction, or external degree programs). If the proposed delivery system will require specialized services or greater than normal financial support, include projected costs in Table 2 in Appendix A. Provide a narrative describing the feasibility of delivering the proposed program through collaboration with other universities, both public and private. Cite specific queries made of other institutions with respect to shared courses, distance/distributed learning technologies, and joint-use facilities for research or internships.**

The proposed B.S. in Integrated Public Relations and Advertising will be primarily delivered on campus (80%) with some online courses offered (20%) where appropriate to course learning objectives. In addition, as previously mentioned, many of the courses are already established and offered in a traditional format.

IX. Faculty Participation

- A. Use Table 4 in Appendix A to identify existing and anticipated full-time (not visiting or adjunct) faculty who will participate in the proposed program through Year 5. Include (a) faculty code associated with the source of funding for the position; (b) name; (c) highest degree held; (d) academic discipline or specialization; (e) contract status (tenure, tenure-earning, or multi-year annual [MYA]); (f) contract length in months; and (g) percent of annual effort that will be directed toward the proposed program (instruction, advising, supervising internships and practica, and supervising thesis or dissertation hours).**

Because faculty in the Zimmerman School of Advertising and Mass Communications will begin to teach in this new major with students already enrolled in the older concentrations of Advertising and Public Relations, there will be a relatively seamless “teach-in” of the new curriculum during the “teach out” of the old curriculum. The program’s Cost Per FTE is slightly below state averages due to the fact this program and its students are essentially already in place under the old CIP and curriculum, allowing the School to realize savings that a startup program would not experience. We anticipate switching existing students over to the new program in large numbers. Staffing will include the Director/ Associate Professor of the Zimmerman School, 10 tenured or tenure-track faculty members, and seven instructors with significant professional experience. Academic advising is provided centrally through the College of Arts & Sciences. Overall the delivery of the program in terms of cost per FTE is highly efficient.

- B. Use Table 2 in Appendix A to display the costs and associated funding resources for existing and anticipated full-time faculty (as identified in Table 4 in Appendix A). Costs for visiting and adjunct faculty should be included in the category of Other Personnel Services (OPS). Provide a narrative summarizing projected costs and funding sources.**

See explanation above in III A

- C. Provide in the appendices the abbreviated curriculum vitae (CV) for each existing faculty member (do not include information for visiting or adjunct faculty).**

See Appendix D.

- D. Provide evidence that the academic unit(s) associated with this new degree have been productive in teaching, research, and service. Such evidence may include trends over time for average course load, FTE productivity, student HC in major or service courses, degrees granted, external funding attracted, as well as qualitative indicators of excellence.**

The USF Zimmerman School of Advertising and Mass Communications has a proven track record of recruitment, retention, and graduation at the bachelor’s and master’s levels. Currently offering the B.A. in Mass Communications with six concentrations, the Zimmerman School has averaged an unduplicated headcount of 1,186 students and conferred an average of 254 baccalaureate degrees annually across the past six academic years. More than 200 of our students participated in for credit internships annually, and the School typically has the highest rates of student participation in Education Abroad at USF. Our graduates populate the leadership of Tampa Bay media-related professional societies, such as the American Advertising Federation’s Ad 2 Tampa Bay. The School also has been among the best in the college for percentage of students graduating without excess hours.

The Zimmerman School has increased the research productivity of its faculty within the past three academic years and was awarded its first-ever federal grant in 2015. Our faculty publish in, edit, and serve on the editorial boards of the top-ranked peer-reviewed journals in mass communications. One faculty member who will teach the Law & Ethics course in this new major was awarded a prestigious American Political Science Association Congressional Fellowship in 2015 that sent him to Washington D.C. for nine months to work hand-in-hand with members of Congress to develop media law and policy.

School faculty teaching accounts for between 50% and 90% of their assigned workload effort each semester. Most faculty members are assigned at least 5% of their workload to provide service within the University, professional community, or both. Faculty members use service time to serve on a variety of committees throughout the University, act as journal editors and journal editorial board members, participate in national professional organizations, and serve as liaisons between students and the Florida professional media industry. All Zimmerman School faculty members participate in these activities. The Zimmerman School has 24 full-time faculty, including 11 instructors.

X. Non-Faculty Resources

- A. Describe library resources currently available to implement and/or sustain the proposed program through Year 5. Provide the total number of volumes and serials available in this discipline and related fields. List major journals that are available to the university's students. Include a signed statement from the Library Director that this subsection and subsection B have been reviewed and approved.**

The USF Library at Tampa has access to numerous databases and e-journals of top advertising, public relations, marketing, mass communications and other communications-related journal and periodicals; additional databases include Web of Knowledge, Web of Science PsycINFO, Business Source Premier, Communications Studies, etc. Current advertising and public relations students and faculty members have access to a total of 700 volumes and serials through the USF Libraries system, online or in print copies.

- Please see Appendix C for full list of library resources.

Recognizing the value and importance of research, the USF Libraries will continue a sustained level of support that will meet the needs of undergraduate students who are pursuing a degree in Integrated Public Relations and Advertising.

In any given year, the USF Libraries materials budget is pushed to its limit. The rising cost of continuing journal subscriptions, the need for new research materials, and requests for access to online databases and data sets are part of the daily landscape. A large portion of the USF Libraries' \$6.2 million budget supports the continuation of electronic resources. Within the next five years, the expectation is for a continued level of support for this discipline. An increase in the cost of the library's journal subscriptions is anticipated, with typical annual increases of 3-6 percent. The acquisition of additional resources will have to be balanced against the research needs of other academic disciplines within the confines of any budgetary restraints that the University could face during the next five years.

Prepared by: Cheryl McCoy, Coordinator of Collections, USF Libraries

- B. Describe additional library resources that are needed to implement and/or sustain the program through Year 5. Include projected costs of additional library resources in Table 2 in Appendix A. Please include the signature of the Library Director in Appendix B.**

This new degree program has been in effect under the existing Mass Communications B.A. degree. Therefore, we do not anticipate a need for additional allocation of resources at this time.

- C. Describe classroom, teaching laboratory, research laboratory, office, and other types of space that are necessary and currently available to implement the proposed program through Year 5.**

We have 6 classroom spaces with approximately 17-20 seats; all of the classrooms are computer labs with full Adobe Cloud suites installed; a social media laboratory; full departmental offices; production studio space (2 fully equipped telecomm studios, with control rooms and 10 edit suites).

- D. Describe additional classroom, teaching laboratory, research laboratory, office, and other space needed to implement and/or maintain the proposed program through Year 5. Include any projected Instruction and Research (I&R) costs of additional space in Table 2 in Appendix A. Do not include costs for new construction because that information should be provided in response to X (E) below.**

We do not anticipate a need for additional equipment to accommodate the program at this time.

- E. If a new capital expenditure for instructional or research space is required, indicate where this item appears on the university's fixed capital outlay priority list. Table 2 in Appendix A includes only Instruction and Research (I&R) costs. If non-I&R costs, such as indirect costs affecting libraries and student services, are expected to increase as a result of the program, describe and estimate those expenses in narrative form below. It is expected that high enrollment programs in particular would necessitate increased costs in non-I&R activities.**

Not applicable.

- F. Describe specialized equipment that is currently available to implement the proposed program through Year 5. Focus primarily on instructional and research requirements.**

We presently have 6 classroom/computer labs, fully installed with Adobe CC suites; two production studios; 10 edit suites; and access to production facilities at the former WUSF-TV studios for some courses. We have audio, video and DSLR cameras that creative content production classes will use.

- G. Describe additional specialized equipment that will be needed to implement and/or sustain the proposed program through Year 5. Include projected costs of additional equipment in Table 2 in Appendix A.**

Not applicable.

- H. Describe any additional special categories of resources needed to implement the program through Year 5 (access to proprietary research facilities, specialized services, extended travel, etc.). Include projected costs of special resources in Table 2 in Appendix A.**

Not applicable.

- I. Describe fellowships, scholarships, and graduate assistantships to be allocated to the proposed program through Year 5. Include the projected costs in Table 2 in Appendix A.**

Not applicable.

J. Describe currently available sites for internship and practicum experiences, if appropriate to the program. Describe plans to seek additional sites in Years 1 through 5.

The Zimmerman School presently places more than 200 interns-for-credit annually in advertising and public relations with such national and Tampa Bay companies as: 22squared, Zimmerman Advertising, Triad Retail Media, FKQ, PP+K, SPARK, Dunn & Co., Amalie Arena, Telemundo Tampa, Entravision, Univision, ChappellRoberts, Tampa Bay Lightning, Tampa Bay Rays, the Tampa Sports Authority, Clearwater Threshers (MLB minor league), Fort Myers Miracle (MLB minor league), Hype Group, Shriners Hospital, Lowry Park Zoo, AARP Florida, Beasley Media Group, Inc., iHeartMedia, Inc., Tampa Bay Water, Polk County Supervisor of Elections, Children's Cancer Center, to name a few of the sites. All faculty continue to work to develop new partnerships for student internships, an effort coordinated by the School's Associate Director with staff support.

APPENDICES

APPENDIX A
TABLE 1-A
PROJECTED HEADCOUNT FROM POTENTIAL SOURCES
(Baccalaureate Degree Program)

Source of Students (Non-duplicated headcount in any given year)*	Year 1		Year 2		Year 3		Year 4		Year 5	
	HC	FTE	HC	FTE	HC	FTE	HC	FTE	HC	FTE
Upper-level students who are transferring from other majors within the university**	200	160.0	75	60.0	0	0.0	0	0.0	0	0.0
Students who initially entered the university as FTIC students and who are progressing from the lower to the upper level***	75	60.0	200	160.0	300	240.0	320	256.0	340	272.0
Florida community college transfers to the upper level***	5	4.0	10	8.0	10	8.0	10	8.0	10	8.0
Transfers to the upper level from other Florida colleges and universities****	0	0.0	5	4.0	5	4.0	5	4.0	5	4.0
Transfers from out of state colleges and universities***	5	4.0	12	9.6	12	9.6	15	12.0	15	12.0
Other (Explain)***	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
Totals	285	228.0	302	241.6	327	261.6	350	280.0	370	296.0

* List projected annual headcount of students enrolled in the degree program. List projected yearly cumulative ENROLLMENTS instead of admissions.

** If numbers appear in this category, they should go DOWN in later years.

*** Do not include individuals counted in any PRIOR CATEGORY in a given COLUMN.

APPENDIX A
TABLES

APPENDIX A

TABLE 2
PROJECTED COSTS AND FUNDING SOURCES

Instruction & Research Costs (non-cumulative)	Year 1							Year 5							
	Funding Source							Funding Source							
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Faculty Salaries and Benefits	525,825	0	0	0	0	0	0	\$525,825	640,766	0	0	0	0	0	\$640,766
A & P Salaries and Benefits	46,400	0	0	0	0	0	0	\$46,400	46,400	0	0	0	0	0	\$46,400
USPS Salaries and Benefits	33,166	0	0	0	0	0	0	\$33,166	33,166	0	0	0	0	0	\$33,166
Other Personal Services	0	0	0	0	0	0	0	\$0	0	0	0	0	0	0	\$0
Assistantships & Fellowships	0	0	0	0	0	0	0	\$0	0	0	0	0	0	0	\$0
Library	0	0	0	0	0	0	0	\$0	0	0	0	0	0	0	\$0
Expenses	0	0	0	0	0	0	0	\$0	0	0	0	0	0	0	\$0
Operating Capital Outlay	0	0	0	0	0	0	0	\$0	0	0	0	0	0	0	\$0
Special Categories	0	0	0	0	0	0	0	\$0	0	0	0	0	0	0	\$0
Total Costs	\$605,391	\$0	\$0	\$0	\$0	\$0	\$0	\$605,391	\$720,332	\$0	\$0	\$0	\$0	\$0	\$720,332

*Identify reallocation sources in Table 3.

**Includes recurring E&G funded costs ("reallocated base," "enrollment growth," and "other new recurring") from Years 1-4 that continue into Year 5.

***Identify if non-recurring.

Faculty and Staff Summary

Total Positions	Year 1	Year 5
Faculty (person-years)	5.29	6.28
A & P (FTE)	1.2	1.2
USPS (FTE)	0.67	0.67

Calculated Cost per Student FTE

	Year 1	Year 5
Total E&G Funding	\$605,391	\$720,332
Annual Student FTE	228	296
E&G Cost per FTE	\$2,655	\$2,434

APPENDIX A
TABLE 4
ANTICIPATED FACULTY PARTICIPATION

Faculty Code	Faculty Name or "New Hire" Highest Degree Held Academic Discipline or Speciality	Rank	Contract Status	Initial Date for Participation in Program	Mos. Contract Year 1	FTE Year 1	% Effort for Prg. Year 1	PY Year 1	Mos. Contract Year 5	FTE Year 5	% Effort for Prg. Year 5	PY Year 5	PY Workload by Budget Classification	
													Year 1	Year 5
B	New Hire Advertising	Director / Full Professor	Tenure	Fall 2018	12	1.00	0.50	0.50	12	1.00	0.50	0.50		
A	Janelle Applequist, Ph.D. Health advertising	Professor	Tenure-earning	Fall 2018	9	0.75	0.75	0.56	9	0.75	0.75	0.56		
A	Justin S. Brown, Ph.D. Media Law and public policy	Professor	Tenure-earning	Fall 2018	9	0.75	0.25	0.19	9	0.75	0.25	0.19		
A	Kelli S. Burns, Ph.D. Public Relations	Professor	Tenure	Fall 2018	9	0.75	0.50	0.38	9	0.75	0.75	0.56		
A	Kevin Hawley, M.A. Advertising	Instructor I	LTC	Fall 2018	9	0.75	1.00	0.75	9	0.75	1.00	0.75		
A	Saokang Liu, Ph.D. Advertising	Professor	Tenure	Fall 2018	9	0.75	0.75	0.75	9	0.75	0.75	0.56		
A	Charles O'Brien, M.A. Advertising	Instructor II	LTC	Fall 2018	9	0.75	1.00	0.75	9	0.75	1.00	0.75		
A	Artemio Ramirez, Ph.D. Advertising	Professor	Tenure	Fall 2018	9	0.75	0.19	0.14	9	0.75	0.38	0.29		
A	Debra Smith, M.A. Advertising	Instructor II	LTC	Fall 2018	9	0.75	1.00	0.75	9	0.75	1.00	0.75		
A	Kimberly K. Walker, Ph.D. Health Care Public Relations	Professor	Tenure-earning	Fall 2018	9	0.75	0.19	0.14	9	0.75	0.38	0.29		
B	New Hire/Endowed Chair Advertising	Professor	Tenure-earning	Fall 2019	9	0.75	0.00	0.00	9	0.75	0.38	0.29		
A	Kelly Page Werder, Ph.D. Public Relations	Professor	Tenure	Fall 2019	9	0.75	0.00	0.00	9	0.75	0.56	0.42		
A	Wendy Whit, M.Ed., M.A. Public Relations/Journalism	Instructor I	LTC	Fall 2018	9	0.75	0.50	0.38	9	0.75	0.50	0.38		
Total Person-Years (PY)								5.29				6.28		
Faculty Code	Source of Funding	PY Workload by Budget Classification												
		Year 1	Year 5											
A	Existing faculty on a regular line	Current Education & General Revenue	4.79	5.40										
B	New faculty to be hired on a vacant line	Current Education & General Revenue	0.50	0.88										
C	New faculty to be hired on a new line	New Education & General Revenue	0.00	0.00										
D	Existing faculty hired on contracts/grants	Contracts/Grants	0.00	0.00										
E	New faculty to be hired on contracts/grants	Contracts/Grants	0.00	0.00										
Overall Totals for		Year 1	5.29	Year 5	6.28									

APPENDIX B

Please include the signature of the Equal Opportunity Officer and the Library Director.

Step 5: It is anticipated that graduates of this program will become our best recruiters of all underrepresented students.




Signature of Equal Opportunity Officer

12-2-16

Date

Signature of Equal Opportunity Officer

Date



Signature of Library Director

12/1/16

Date

This appendix was created to facilitate the collection of signatures in support of the proposal. Signatures in this section illustrate that the Equal Opportunity Officer has reviewed section II.E of the proposal and the Library Director has reviewed sections X.A and X.B.

APPENDIX C

USF Library resources in mass communications-related topics:

- Advertising - 24 (USF Tampa Library print journals), 83 (online journals)
- Public relations - 17 (USF Tampa Library print journals), 38 (online journals)
- Mass communications (catalog uses subject term of "Mass media") - 39 (USF Tampa Library print journals), 184 (online journals)
- Marketing - 54 (USF Tampa Library print journals), 268 (online journals)

Journals in Library holdings in subject areas Advertising and Public Relations:

Adageglobal
 AdMedia
 Advances in Marketing and Public Policy
 Advertising Age
 Advertising Age International
 Advertising Age's Creativity
 Advertising Age Yearbook
 Adweek
 Adweek: New England Advertising Week
 All about ROI
 B to B
 'Boards
 Business Marketing
 Campaign
 CASE Currents
 Communique
 Corporate Reputation Review
 Creative Review
 Creativity
 Electronic Advertising & Marketplace Report
 Florida Newspaper News and Radio Digest
 FrontLine
 Gebrauchsgraphik. International Advertising Art
 Industrial Marketing
 Inside Media
 International Journal of Advertising
 International Public Relations Review
 Jack O'Dwyer's Newsletter
 Journal of Advertising
 Journal of Advertising Research
 Journal of Corporate Public Relations
 Journal of Current Issues and Research in Advertising
 Journal of Higher Education Outreach & Engagement
 Journal of Hospital Marketing & Public Relations
 Journal of Interactive Advertising
 Journal of Integrated Communications
 Journal of International Consumer Marketing
 Journal of Public Affairs
 Journal of Public Relations Research
 The Library Imagination Paper
 Madison Avenue
 Marketing/Communications
 Marketing & Media Decisions
 Marketing Week
 Matrix

Media Decisions
Mediaweek
Museums & Social Issues: A Journal of Reflective Discourse
National Advertising Investments
NZ Marketing Magazine
O'Dwyer's PR Services Report
Organismo: Revista Brasileira de Comunicação Organizacional e Relações Públicas
Place Branding and Public Diplomacy
Potentials
Potentials in Marketing
Printers' Ink
PR News Media Hot Sheet
Prism
PROMO
PRweek
The Public Relations Journal
Public Relations News
Public Relations Quarterly
Public Relations Review
The Public Relations Strategist
Public Relations Tactics
Publics et Musees
Reporter of Direct Mail Advertising
Revista FAMECOS
Revista internacional de relaciones públicas
Revista română de comunicare și relații publice
Southern Advertising/Markets
Successful Promotions

APPENDIX D CURRICULUM VITAE

JANELLE APPLEQUIST

University of South Florida <http://www.janelleapplequist.com>

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The Zimmerman School of Advertising and Mass Communications

4202 E. Fowler Ave., CIS 3099

Tampa, FL 33620

EDUCATION

Ph.D. Mass Communications, GPA: 3.97

College of Communications, The Pennsylvania State University, 2015

M.A. Media Studies, GPA: 3.94

The Pennsylvania State University, 2011

B.A. Broadcast Journalism, Minor: Psychology

The Pennsylvania State University, University Park, 2009

Cumulative GPA: 3.84; GPA for Major: 4.00

ACADEMIC APPOINTMENTS

Assistant Professor, Tenure-Track

The Zimmerman School of Advertising and Mass Communications

University of South Florida

August 2015-present

Graduate Instructor

Department of Film-Video and Media Studies

The Pennsylvania State University (University Park)

Summer 2012-Spring 2015

Graduate Teaching Assistant

Department of Film-Video and Media Studies

The Pennsylvania State University (University Park)

Spring 2011-Fall 2012

JOURNAL ARTICLES

Applequist, J. (2014). "The part too often left out involves the perspectives of patients: Helping health care providers understand the material reality of the everyday for individuals with eating disorders". *Journal of Medicine and the Person*, 12(3), 118-124. doi: 10.1007/s12682-014-0186-1

Applequist, J. (2014). "Pinterest, gender reveal parties and the binary: Reducing an impending arrival to 'pink' or 'blue'". *Pennsylvania Communication Annual*, 70(3), 51-65. ISSN: 2372-6350

Applequist, J. (2013). "Constructions of the patient as consumer in the patient-centered medical home". *Journal of Communications Media Studies*, 5(1), 44-58.

Applequist, J. (under review). "Appeals used to sell prescription drugs: Critical and content analyses of prime time television direct-to-consumer advertising". *Journal of Communication*.

Applequist, J., Miller-Day, M., Bricker, P.L., Bleser, W.K., Cronholm, P.F., & Gabbay, R. A. (under review). "In principle we have agreement, but in practice it is a bit more difficult: Obtaining organizational buy-in to patient-centered medical home transformation". *Journal of Health Communication*.

BOOK CHAPTERS

Applequist, J. (accepted and forthcoming). "Let it go, let it go!: Resistance via counterhegemony and traditional representations of hegemony as seen in Disney's *Frozen*". In K. Roberts (Ed.), *Communication Basics for Millennials – Essays on Communication Theory and Culture*. New York, NY: Peter Lang.

REFEREED PAPERS PRESENTED AT PROFESSIONAL MEETINGS

- Applequist, J. (2015, November). *How the Pharmaceutical Industry Portrays "Successful" Elements of Aging Alongside Consumerist Health Discourses in Advertising*. To be presented at the National Communication Association, Las Vegas, NV.
- Applequist, J. (2015, November). *TEDx Talks: Embracing Opportunities for Outreach*. To be presented at the National Communication Association, Las Vegas, NV.
- Applequist, J. (2015, November). *The Commercial Elements of Constructing a Prescription Drug: A Case Study of YAZ and its Implications for Perceived Feminist Empowerment*. To be presented at the National Communication Association, Las Vegas, NV.
- Applequist, J. (2015, November). *Click "Healing": A Case Study of Pharmaceutical Advertising Online and Nexium's Website as a form of the Health Belief Model*. To be presented at the National Communication Association, Las Vegas, NV.
- Applequist, J. & McAllister, M. (2015, April). *Understanding the Commercialization of Mediated Politics from a Political Economic Perspective*. Presented at the Eastern Communication Association, Philadelphia, PA.
- Applequist, J. (2014, November). *The Implementation of Electronic Medical Records: Best Practices for Increasing Overall Healthcare Understanding while Decreasing Medical Costs*. Presented at the National Communication Association, Chicago, IL.
- Applequist, J. (2014, November). *Approaching Anorexia and Recovery via Ethnographic Research: How the Trans-theoretical Model of Change can be used as a Supplement to Health Care Provider and Patient Education*. Presented at the National Communication Association, Chicago, IL.
- Applequist, J. & Antunovic, D. (2013, May). *Belieber discourses: Justin Bieber's faith in secular and the religious markets*. Presented at the Beyond the Margins conference, Chicago, Illinois.
- Applequist, J. (2013, March). *Is it a girl or a boy? Gender reveal parties and Pinterest*. Graduate Student Exhibition. Poster presentation at the Pennsylvania State University, University Park, PA.
- Applequist, J. (2013, March). *Health care messages in support of eating disorder recovery: Obtaining patient voice and having empathy*. Presented at the Communications Graduate Forum conference, University Park, PA.
- Applequist, J. (2012, November). *The digitization of medical records and the ethical implications: How privacy concerns can be alleviated through proper attention and education*. Presented at the National Communication Association, Orlando, FL.
- Applequist, J. (2012, November). *Constructions of the patient-centered medical home's information technology: Viewing the "patient" as "consumer."* Presented at the National Communication Association, Orlando, FL.
- Elavsky, M., Applequist, J., & Morar, D. (2012, March). *Global communication pedagogy as hybridized collaborative engagements*. Presented at the Penn State Symposium for Teaching and Learning with Technology, University Park, PA.
- Applequist, J. (2010, October). *Direct-to-consumer advertising and health communication research*. Presented at the Union for Democratic Communications, University Park, PA.

RESEARCH REPORTS FOR THE MEDICAL FIELD

- Applequist, J. (2014, May). *TED Speaker Encourages to "Find Your Moment and Share it with the World"*. 2014 Research Articles: Issue 8. Conquer Chiari Non-Profit Foundation. Available online at <http://www.conquerchiari.org/subs%20only/Articles%20%2714/find-your-moment.html>.
- Applequist, J. (2013, August). *PAFP Research Report on "Transitioning to a Patient-Centered Medical Home (PCMH): How Practices are Educating Transformation to Patients and Perceived Effectiveness of Patient Education by Professional Role"*. N.P.: The Pennsylvania Academy of Family Physicians and the Penn State Milton S. Hershey Medical Center. (distributed to all 4,000+ PAFP members statewide)
- Gabbay, R., M.D., Miller-Day, M. & Applequist, J. (2013, February). *PAFP Research Report*. N.P.: The Pennsylvania Academy of Family Physicians and the Penn State Milton S. Hershey Medical Center.

GRANTS

- Full Grant Recipient. (2013). The Don Davis Program in Ethical Leadership, project titled *Walt Disney World's Representations of Culture: Epcot's World Showcase and Commodified Ethnocentrism*, The Pennsylvania State University, 2013 (\$2,500).
- Full Grant Recipient. (2013). The Arthur W. Page Center for Integrity in Public Communications, project titled *Organizational Communication and the transition to a patient-centered medical home (PCMH): How practices are advertising health and wellness programs to patients in accordance with the PCMH's principles*, The Pennsylvania State University, 2013 (\$2,500).

Full Travel Grant Recipient. (2013). European Sociological Association, Turin, Italy; August 2013.
Full Travel Grant Recipient. (2012). Cultural Studies Association of Australasia, Sydney, Australia;
December 2012.
Grant Co-Writer and Team Recipient. (2012). U.S. Department of Health and Human Services – Agency
for Healthcare Research and Quality & the Aetna Foundation, for a longitudinal project coordinated with
The University of Pennsylvania and the Milton S. Hershey Medical School, conducting research 2011-
present.

Justin S. Brown

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EDUCATION

Ph.D., Mass Communications, 2001
College of Communications
The Pennsylvania State University
University Park, PA

M.A., Telecommunications Studies, 1997
College of Communications
The Pennsylvania State University
University Park, PA

B.S., Journalism, 1993
School of Journalism and Communication
University of Oregon
Eugene, OR

ACADEMIC EXPERIENCE

Assistant Professor, 2011-present
School of Mass Communications
College of Arts & Sciences
University of South Florida

Assistant Professor, 2009-2011
Department of Mass Communication
College of Arts & Sciences
Winthrop University

Assistant Professor, 2001-2008
Department of Telecommunication
College of Journalism and Communications
University of Florida

PUBLICATIONS

"Neutrality 2.0: The Broadband Transition to Transparency," lead author with Drew Bagley, accepted for publication in *Fordham Intellectual Property, Media & Entertainment Law Journal*, Vol. 25 (2015).

"Consumer Legal Protections Against the Layers of Big Data," co-author with Drew Bagley, accepted for publication in *Santa Clara High Technology Law Journal*, Vol. 31 (2015).

"Determinants of IPTV Diffusion," co-authored with Sangwon Lee, Seonmi Lee and Eun-A Park, *Telematics & Infomatics* 32, 439-446 (2015).

"The Determinants of Ubiquitous Broadband Deployment: Examination of Adoption Factors among Developed and Developing Countries," co-authored with Sangwon Lee, in Richard Taylor & Amit Schejter (Eds.), *Beyond Broadband Access: Data Based Information Policy*, 69-87, New York, NY: Fordham University Press (2013).

"A Cross-Country Analysis of Fixed Broadband Deployment: Examination of Adoption Factors and Network Effect," co-authored with Sangwon Lee and Seonmi Lee, *Journalism & Mass Communication Quarterly* 88 (3), 580-596 (2011).

"Liberty Tree Initiative Events Make the First Amendment Come Alive" *Media Law Notes* 38 (2) 2010, pp. 1 & 3.

"Examining Broadband Adoption Factors: An Empirical Analysis Between Countries," with Sangwon Lee, *info* 10 (1), 25-39 (2008).

"The Future of the Broadcast Flag: An Analysis of the Broadcast Flag's Compatibility with Existing Copyright Law & Incompatibility with the Digital Media Marketplace," with Drew Bagley, *IDEA: The Intellectual Property Law Review* 47(5) 607-658 (2007).

"Cable Operators' Fifth Amendment Claims Applied to Digital Must-Carry," co-authored with Nissa Laughner, *Federal Communications Law Journal* 58(2), 283-322 (2006).

"Digital Must-Carry and the Case for Public Television," *Cornell Journal of Law & Public Policy* 15(1), 73-109 (2005).

"Fostering the Public's End-to-End: A Policy Initiative for Separating Broadband Transport from Content," *Communication Law & Policy* 8(2), 145-199 (2003).

"Explicating Online Interactivity: Impression-Formation Effects in Political Websites," co-authored with S. Shyam Sundar and Sriram Kalyanaraman, *Communication Research* 30(1), 30-59 (2003).

Author of "learning objectives" and "multiple choice questions" for CD-ROM Study Guide to Accompany Don Pember's *Mass Media Law* (2002-03, 2004-05 Eds.)

"Cultures, Institutions and Organizations on the Internet," *UNESCO's Encyclopedia of Life Support Systems (EOLSS)*, Vol. 6.33.4.2 (2003).

"Video Voyeurism, Privacy and the Internet: Exposing Peeping Toms in Cyberspace," co-authored with Clay Calvert, *Cardozo Arts & Entertainment Law Journal* 18, 469-568 (2000).

Kelli S. Burns, Ph.D.

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Education

Ph.D. (8/03) University of Florida Gainesville, FL
 Mass Communication

M.S. (5/98) Middle Tennessee State University Murfreesboro, TN
 Mass Communication

B.A. (5/92) Vanderbilt University Nashville, TN
 Mathematics, Business Administration (minor)

Administrative Experience

University of South Florida
 Associate Program Director and Director of Undergraduate Studies 2012-2014
 Public Relations Sequence Head 2010-2012

Elon University
Fellows Program Director 2004-2006

Teaching Experience

University of South Florida
 Associate Professor 2011-present
 Assistant Professor 2006-2011

Elon University
 Assistant Professor 2003-2006

Middle Tennessee State University
 Instructor 2002-2003

University of Florida
 Instructor 1999-2000

Books

Burns, K.S. (forthcoming 2016). *Social media: A reference handbook*. ABC-CLIO.

Burns, K.S. (2009). *Celeb 2.0: How social media foster our fascination with popular culture*. Santa Barbara, CA: Praeger.

Refereed Journal Publications

Burns, K.S. (2015, forthcoming). "How the top social media brands use influencer and brand advocacy campaigns to engage fans". *PRism*.

Burns, K.S. (2012). "Mommy bloggers speak out: Reactions to the FTC's guidelines concerning the use of endorsements and testimonials". *Journal of New Communications Research, 2011 Anthology*.

Burns, K.S. (2008). "The misuse of social media: Reactions to and important lessons from a blog fiasco". *Journal of New Communications Research, 3(1)*, 41-54.

Burns, K.S., & Lutz, R. J. (2008). "Web users' perceptions of and attitudes toward online advertising formats". *International Journal of Internet Marketing and Advertising, 4(4)*, 281-301.

- Kuhn, A., & Burns, K.S. (2008). "From MySpace to BrandSpace: Elements of brand-sponsored MySpace profiles". In S. Rodgers (Ed.), *Proceedings of the 2008 Conference of the American Academy of Advertising*.
- Burns, K.S., & Lutz, R. J. (2006). "The function of format: Consumer responses to six online advertising formats". *Journal of Advertising*, 35(1), 53-64.
- Burns, K.S. (2006). "Problems found in reporting USA Today pre-election polls". *Newspaper Research Journal*, 27(4), 38-51.
- Burns, K.S., & Lutz, R. J. (2004). "Format matters: Examining the precursors to and effects of attitudes toward six online advertising formats". Abstract published in the *Proceedings of the 2004 Conference of the American Academy of Advertising*, 239-240.
- Burns, K.S. (2000). "Branding in cyberspace: Using the congruity of consumer and Web site personality to unravel online user satisfaction". *Proceedings of the 2000 Conference of the American Academy of Advertising*.

Kevin Hawley

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EDUCATION

University of Toronto, Toronto, Canada

M.A. Political Science, Specialist in International Relations
B.A. (Hons) History & Political Science

Institute of Communications and Advertising, Toronto, Canada

Communications and Advertising Accredited Professional
Three-year professional program for those working in the advertising and communications industries

University of South Florida, Tampa, FL

Certified Online Educator, November 2012

ACADEMIC EXPERIENCE

University of South Florida, Tampa, FL August 2013 - Present
Instructor & Public Relations Sequence Head

University of South Florida, Tampa, FL August 2011 - May 2013
Visiting Instructor

University of South Florida, Tampa, FL January 2011 - May 2011

Adjunct Instructor
Taught Advertising Creativity in the Zimmerman Advertising Program in the School of Mass Communications

Ringling College of Art and Design, Sarasota, FL January 2010 - December 2010

Adjunct Instructor

PROFESSIONAL EXPERIENCE

Freelance Creative, Tampa, FL May 2011 - Present
Creative Director/Copywriter/Art Director/Graphic Designer

Clarke/Eric Mower & Associates, Sarasota, FL March 2007 - April 2011
Vice President, Creative Director

BeachHead Advertising, Tampa, FL May 2006 - April 2011
Owner

Fahlgren Benito, Tampa, FL July 2002 - May 2006
Executive Vice President, Creative Director

Fahlgren, Columbus, OH March 1999 - June 2002
Associate Creative Director

Gee, Jeffery & Partners, Toronto, Canada July 1997 - March 1999
Associate Creative Director

JWT/Enterprise, Toronto, Canada August 1987 - June 1997
Senior Copywriter

Scott S. Liu, Ph.D.

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Professional Experience

1999 – present Associate Professor, School of Mass Communications, USF
2007 – 2009 Zimmerman Endowed Professor, School of Mass Communications, USF
1993 – 1999 Assistant Professor, School of Mass Communications, USF
1996 (summer) Visiting Professor, Disney/ABC Network
1994 – 1995 Visiting Professor, Dept. of Advertising, National Chengchi University, Taiwan
1989 – 1992 Assistant Professor, Manship School of Journalism, Louisiana State University

Education

Ph.D. in Advertising, University of Texas at Austin
M.A. in Journalism, University of Wisconsin at Madison
B.A. in Foreign Language and Literature, Tunghai University, Taiwan

Sample Research

Hickman, J. & Liu, S. (2013). "Framing presidential speeches on the end of Operation Iraqi Freedom". Paper presented at the *AEJMC Southeast Colloquium*, Tampa, FL.
Liu, S., Johnson, K. & O'Brien, C. (2009). "Why copycats sell: A dual-process explanation". *Proceedings of the American Academy of Advertising Asian-Pacific Conference in Beijing*, 112-114.
Begin, G. & Liu, S. (2006). "Attitudinal antecedents of the first- and third-person effects of alcohol advertising on college students". *Proceedings of the Annual Conference of the American Academy of Advertising*, 64-71.
Liu, S. & Johnson, K. (2005). "The automatic country-of-origin effects on brand judgments". *Journal of Advertising*, 34 (1), 87-97.
Liu, S. (1999). "When the irrelevant becomes relevant: The similarity-to-old effect on brand categorization". *Journal of Current Issues & Research in Advertising*, 31-47.
Liu, S. & Stout, P. (1987). "Effects of message modality and appeal on advertising acceptance". *Psychology and Marketing*, 167-187.
Liu, S. & Franke, G. (1986). "Improving marketing measures by rescaling variables: A comparison of dual Scaling and PRINQUAL". In R. King (Ed.), *Marketing in an environment of change* (pp. 236-250). Charleston, SC: SMA.

COBY O'BRIEN

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EDUCATION

M.A. Mass Communications
School of Mass Communications, College of Arts and Sciences, University of South Florida

B.S. Advertising
S.I. Newhouse School of Public Communications, Syracuse University

A.A.S. Commercial Art and Advertising Design
Guilford Technical Institute, Greensboro, NC

EXPERIENCE

Instructor II
Zimmerman Advertising Program, School of Mass Communications, University of South Florida
2007- Present

Business Development
AKQA, New York City/Washington DC/San Francisco/London

President/CEO
Darwin Digital, New York City/San Francisco

EVP, Business Development, Creative Director
Saatchi & Saatchi, New York City/London SVP, Creative

Group Head
Dancer Fitzgerald Sample, New York City

Graphic Designer
Silverman Mower, Syracuse, NY

Mechanical Artist
The William Babcock Agency, Greensboro, NC

Artemio Ramirez, Jr., Ph.D.

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Education

- Ph.D. Communication: University of Arizona, December 2000
- M.A. Communication and Theater: The University of Illinois at Chicago, 1992
- B.A. Communication and Theater: The University of Illinois at Chicago, 1990

Summary of Professional Experience

2014-present *Associate Professor*
 Zimmerman School of Advertising and Mass Communications
 University of South Florida, Tampa, FL

2012-2014 *Associate Professor*
 Department of Communication
 University of South Florida, Tampa, FL

2011-2012 *Associate Professor in Communication*
 University of South Florida Polytechnic, Lakeland, FL

2008-2011 *Assistant Professor*
 Hugh Downs School of Human Communication
 Arizona State University (*tenured 5/11*)

Publications

- Ramirez, Jr., A., Sumner, E. M., & Spinda, J. S. W. (2016, in press). "The relational reconnection function of social network sites". *New Media & Society*.
- Sumner, E. M., & Ramirez, Jr., A. (2016, in press). "Social information processing theory/Hyperpersonal perspective". In P. Roessler, C. Hoffner, & L. van Zoonen (Eds.), *International Encyclopedia of Media Effects*. West Sussex, England: Wiley-Blackwell/International Communication Association. (6,000 words)
- Sumner, E. M., & Ramirez, Jr., A. (2016, in press). "Media and technology studies". In M. Allen (Ed.), *SAGE Encyclopedia of Communication Research Methods*. Thousand Oaks, CA: Sage. (2,500 words)
- Sumner, E. M., Fletcher, J., & Ramirez, Jr., A. (2016, in press). "A functional approach to social network sites". In K. Wright, & L. M. Webb (Eds.), *Computer-Mediated Communication in Personal Relationships* (2nd ed.). Cresskill, NJ: Hampton Press.
- Ramirez, Jr., A., & (Bryant) Sumner, E. (2015, in press). "Modality switching". In C. Berger, & M. Roloff (Eds.), *International Encyclopedia of Interpersonal Communication*. West Sussex, England: Wiley-Blackwell. (4,000 words)
- Ramirez, Jr., A., Sumner, E. M., Fleuriot, C., & Cole, M. (2015). "When online dating partners meet offline: The effect of modality switching on relational communication between online daters". *Journal of Computer-Mediated Communication*, 20, 99-114.
- Walther, J. B., Van Der Heide, B., Ramirez, A. Jr., Burgoon, J. K., & Pena, J. (2015). "Interpersonal and hyperpersonal dimensions of computer-mediated communication". In S. S. Sundar (Ed.), *The Handbook of Psychology and Communication Technology* (pp. 3-22). West Sussex, England: Wiley-Blackwell.
- Rader, J., McDaniel, T., Ramirez, Jr., A., Bala, S., & Panchanathan, S. (2014). "A Wizard of Oz study exploring how agreement/disagreement nonverbal cues enhance social interactions for individuals who are blind". In C. Stephanidis (Ed.), *Proceedings of the 16th International Conference on Human-Computer Interaction* (V17, pp. 243-248). Crete, Greece. Springer International; Switzerland.

- Ramirez, Jr., A., & Bryant, E. M. (2014). "Relational reconnection on social network sites: An examination of relationship persistence and modality switching". *Communication Reports*, 27, 1-12. [Lead Article]
- Bryant, E., Marmo, J., & Ramirez, Jr., A. (2011). "A functional approach to social network sites". In K. Wright, & L. M. Webb (Eds.), *Computer-Mediated Communication in Personal Relationships* (pp. 3-20). Cresskill, NJ: Hampton Press.
- Dimmick, J., Feaster, J., & Ramirez, Jr., A. (2011). "The niches of interpersonal media: Relationships in time and space". *New Media & Society*, 13, 1265-1282.
- Ramirez, Jr., A., Palazzolo, K., Savage, M., & Deiss, D. (2010). "New directions in understanding cyberbullying: Towards conceptualizing a message-based approach". In R. Taiwo (Ed.), *Handbook of Research on Discourse Behavior and Digital Communication: Language Structures and Social Interaction* (pp. 729-744). Hershey, PA: Information Science Reference [IGI Global].
- Ramirez, Jr., A., Sunnafrank, M., & Goei, R. (2010). "Predicted outcome value theory in ongoing relationships". *Communication Monographs*, 1, 27-50.

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EDUCATION

California State University, Fullerton, M.A., Mass Communications, 2010
Emphasis on Mass Communication Research and Theory
University of Arkansas, B.A., Professional Writing, 1980
Emphasis on writing for various media of TV/Radio/Film/Journalism

TEACHING EXPERIENCE

Instructor
University of South Florida
Zimmerman School of Advertising and Mass Communications
2011 - Present

PROFESSIONAL ADVERTISING EXPERIENCE

Saatchi & Saatchi Advertising - Los Angeles, 2004-2010
Associate Creative Director/Senior Copywriter

Saatchi & Saatchi Advertising - L.A. & New York
Senior Copywriter 1998-2004
Copywriter 1990-1998

Kimberly K. Walker, Ph.D.

Assistant Professor
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CURRENT ACADEMIC POSITION

Present Assistant Professor, The Zimmerman School of Advertising and Mass Communications, Tampa, FL

Present Affiliate Assistant Professor, Indiana University School of Dentistry, Indianapolis, IN.

EDUCATION WITH DATE OF GRADUATION

5/2009 PhD, Mass Communication/Minor Public Health; School of Journalism, Indiana University, IN.

12/2002 MA, Journalism; Department of Journalism, Ball State University, IN.

5/1989/1990 BS, Political Science and Accounting, Anderson University, IN.

ACADEMIC AND TEACHING APPOINTMENTS:

8/2015 Assistant Professor, The Zimmerman School of Advertising and Mass Communication, USF, Tampa, FL.

2014-2015 Assistant Professor, Joint appointment. Preventive and Community Dentistry, Indiana University School of Dentistry, Indianapolis IN.

Assistant Professor, Department of Journalism and Public Relations, School of Liberal Arts, Indianapolis, IN.

2012-2014 Assistant Professor, Indiana University School of Journalism at IUPUI, Indianapolis, IN.

2011-2012 Visiting Assistant Professor, Indiana University School of Journalism at IUPUI, Indianapolis, IN.

2011 Grant Specialist, Indiana University School of Journalism at IUPUI, Indianapolis, IN.

2006 Adjunct Instructor, Indiana University School of Journalism, Bloomington, IN.

2005 Adjunct instructor, Department of Communication and Design Arts (formerly Department of Communication), School of Humanities, Anderson University, Anderson, IN.

2003 Adjunct instructor, Falls School of Business, Anderson University, Anderson, IN.

2002-2003 Adjunct instructor, Department of Journalism, Ball State University, Muncie, IN.

2001 Adjunct instructor, Ivy Tech, Anderson, IN.

PEER REVIEWED PUBLICATIONS

Walker, K. & Jackson, R. (accepted for publication). "The importance of developing communication skills: Perceptions of dental hygiene students". *Journal of Dental Hygiene*.

Walker, K. (2015). "Health information seeking and implications for the operative dentist". *Operative Dentistry*, 40 (5), 451-457. doi: <http://dx.doi.org/10.2341/14-312-LIT>.

Walker, K. & Jackson, R. (2015). "The Health Belief Model and determinants of oral hygiene practices and beliefs in pre-teen children: A pilot study". *Pediatric Dentistry*, 37 (1), 40-45.

Walker, K. K., Steinfert, EL, & Keyler, MJ. (2015). "Cues to action as motivators for children's brushing". *Health Communication*, 30 (9), 911-921. doi:10.1080/10410236.2014.904030.

- Walker, K. K. (2015). "A content analysis of cognitive and affective uses of patient support groups for rare vascular diseases: Comparisons of May Thurner, Thoracic Outlet and Superior Mesenteric Artery Syndrome". *Health Communication*, 30 (9), 859-871. doi: 10.1080/10410236.2013.853225.
- Walker, K. K. (2014). "Cognitive and affective uses of a Thoracic Outlet Syndrome Facebook support group". *Health Communication*, 29 (8), 773-781.
- Walker, K. K. (2013). "A case study of patient support group uses for three rare disorders: Klippel-Trenaunay-Weber, Superior Mesenteric Artery, and Thoracic Outlet Syndromes". *Journal of Rare Disorders*, 1(2), 45-52.
- Walker, K. K. (2012). "Thoracic Outlet Syndrome on the top consumer health/medical websites: A case for continuing Healthy People 2020 quality of health-related website objectives". *Journal of Communication in Healthcare*, 5 (2), 75-83. doi:10.1179/1753807612Y0000000005.
- Walker, K. K. (2012). "Bytes, and pixels and pieces of information". *Health Communication*, 28 (3); 314-316. doi: 10.1080/10410236.2012.694353.
- Major, L. H., & Walker, K. K. (2010, fall). "Newspapers lack substantive reporting on sexual issues". *Newspaper Research Journal*, 31 (4), 62-76.

Kelly Page Werder, Ph.D.

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EDUCATION

Doctor of Philosophy, Mass Communication, December 2002
Specialization: Public Relations
University of Florida, Gainesville, Fla.

Master of Science, Corporate and Professional Communication, December 1998
Specialization: Public Relations
Radford University, Radford, Va.

Bachelor of Arts, Communication Studies, June 1991
Major: Public Relations; Minor: Marketing
Virginia Polytechnic Institute and State University, Blacksburg, Va.

ACADEMIC EXPERIENCE

Associate Professor
Zimmerman School of Advertising and Mass Communications
University of South Florida
June 2009 – present; tenured June 2009
Assistant Professor, January 2003 – May 2009
Instructor, August 2001 – December 2002

TEACHING EXPERIENCE

University of South Florida, Tampa, Fla. (2001–present)
University of Florida, Gainesville, Fla. (1999–2001)
Radford University, Radford, Va. (1997–1998)

PROFESSIONAL EXPERIENCE

Research Associate, Department of Speech Communication, Radford University, Radford, Va.
January 1998 – August 1998
Marketing & Public Relations Director, Internet Business Technologies, Inc., Blacksburg, Va.
January 1996 – November 1996
Owner, Page One Media Services, Blacksburg, Va.
February 1992 – February 1997
Publisher/Owner, *ArtBeat Magazine*, Blacksburg, Va.
February 1992 – February 1995
Account Manager, AdVantage Advertising, Marketing, and Design, Inc., Blacksburg, Va.
September 1991 – February 1992

REFEREED JOURNAL ARTICLES

Werder, K. P. (2015). "The integration of domains: Multidisciplinary approaches to strategic communication campaigns". *International Journal of Strategic Communication*, 9(2), 79-86.

Werder, K. P., & Strand, K. (2011). "Measuring student outcomes: An assessment of service learning in the public relations capstone course". *Public Relations Review*, 37(5), 478-484.

Werder, K. P., & Holtzhausen, D. (2011). "Organizational structures and their relationship with public relations management practices". *International Journal of Strategic Communication*, 5(2), 118-142.

Werder, K. P., & Holtzhausen, D. (2009). "An analysis of the influence of public relations

leadership style on public relations strategy use and effectiveness" *Journal of Public Relations Research*, 21(4), 1-24.

Werder, K. P. (2008). "The effect of doing good: An experimental analysis of the influence of corporate social responsibility initiatives on beliefs, attitudes, and behavioral intention." *International Journal of Strategic Communication*, 2(2), 115-135.

Werder, K. P. (2006). "Responding to activism: An experimental analysis of public relations strategy influence on attributes of publics". *Journal of Public Relations Research*, 18(4), 335-356.

Werder, K. P. (2005). "An empirical analysis of the influence of perceived attributes of publics on public relations strategy use and effectiveness". *Journal of Public Relations Research*, 17(3), 217-266.

REFEREED BOOK CHAPTERS

Werder, K. P. (2015). A theoretical framework for strategic communication messaging. In D. Holtzhausen, & A. Zerfass (Eds.), *Handbook of Strategic Communication*. New York, NY: Routledge/Taylor & Francis.

Förster, K., & Werder, K. P. (2012). Does message matter? Der Einfluss von Involvement und Werten auf die Wirksamkeit von Werbebotschaften. In H. Haas, & K. Lobinger (Eds.), *Qualitäten der Werbung - Qualitäten der Werbeforschung [Qualities of Advertising – Qualities of Advertising research]*. Cologne: Halem.

EDITED PUBLICATIONS

Werder, K. P. (Ed.). (2015). *Strategic communication campaigns in a contemporary, networked, and digital society: Special Issue of the International Journal of Strategic Communication*. New York, NY: Routledge/Taylor & Francis.

WENDY M. WHITT

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EDUCATION

Master of Arts, Journalism and Mass Communication, University of North Carolina at Chapel Hill, School of Journalism and Mass Communication, May 1996

Master of Education, Literacy Studies, University of North Carolina at Chapel Hill, School of Education, May 1993

Bachelor of Arts, Education (English), University of North Carolina at Chapel Hill, School of Education, May 1988

TEACHING EXPERIENCE

Instructor, Zimmerman School of Advertising and Mass Communications
University of South Florida, August 2013-present

Adjunct Instructor, School of Mass Communications
University of South Florida, 2008-2011

Reading Instructor, Durham Technical Community College
Durham, N.C., 1994-1995

English and Reading Teacher, Cummings High School
Burlington, N.C., 1988-1994

PROFESSIONAL EXPERIENCE

Public Relations and Communications Coordinator
Hillsborough County Bar Association, May 2012-July 2013

Senior Editor

The Tampa Tribune, October 2002-May 2012

Deputy Copy Desk Chief

The San Diego Union-Tribune, May 2001-October 2002

Editor

Sarasota Herald-Tribune, July 1996-May 2001

Freelance Reporter

The (Raleigh) News & Observer, The Durham Herald-Sun, The Chatham Chronicle, 1994-1996

**APPENDIX E
STATEMENTS OF CONCURRENCE**

Cover page signatures reflect department level concurrences. Other concurrence follow.

Garcia, Wayne

From: Davis, Donna
Sent: Thursday, September 28, 2017 12:14 PM
To: Garcia, Wayne
Cc: Reck, Jacqueline; Nelson, Jackie; Limayem, Moez; Eisenberg, Eric
Subject: Zimmerman School - MS/Advertising and BS/Integrated Public Relations and Advertising

Hello Professor Garcia,

We have reviewed the proposals and coursework in the two new degree proposals listed below from the Zimmerman School of Mass Communications and Advertising. By this email, I am verifying that the Muma College of Business concurs with offering these degrees:

Bachelor of Science/Integrated Public Relations and Advertising
Master of Science/Advertising

Please feel free to contact me if there are any questions.

Thanks.

Donna

Donna F. Davis
Professor and Chair, Marketing
Co-Director, Center for Supply Chain Management & Sustainability
Muma College of Business
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OFFICE OF THE PROVOST AND
VICE PRESIDENT FOR ACADEMIC AFFAIRS

February 2, 2017

Dr. Ralph C. Wilcox
Provost and Executive Vice President
University of South Florida
4200 East Fowler Avenue
Tampa, FL 33620-6100

Dear Dr. Wilcox:

Thank you for the opportunity to review the proposal for the new degree program--Bachelors in Public Relations, Advertising, and Applied Communication. Florida Agricultural and Mechanical University (FAMU) currently offers a B.S. in Public Relations (CIP 09.0902). While there is some overlap between the degree offered at FAMU and the proposed degree for USF, there are enough key differences within the curriculum that warrant duplication. Therefore, we do not believe this program will have a negative impact on the enrollment and degree productivity of FAMU's program and offer full support of the proposed degree.

Best wishes to your team as they move forward in developing the program. We believe this program will be a benefit to the State University System and workforce of Florida.

Sincerely,

A handwritten signature in black ink that reads "Rodner B. Wright for".

Rodner B. Wright, Interim Provost
and Vice President for Academic Affairs

c: Dean Ann Kimbrough
School of Journalism and Graphic Communication

Dr. Sundra Kincey
Director of Program Quality

4. What is your gender?
 5. Please indicate how important you think each of the following are to having a public utilities and advertising performance in the current and emerging media landscape [1 = "Not at all important", 5 = "Very important"]

Response	1	2	3	4	5
Gender					
Male					
Female					
Other					
Very important					
Important					
Not important					
Not at all important					
Total					

Question	Very important					Somewhat important					Not important					Not at all important					
	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5	1	2	3	4	5	
1. Understanding audience segments for advertising purposes	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2. Advertising media selection and placement	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
3. Advertising creative development	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
4. Understanding how and how to use advertising	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
5. Understanding advertising performance	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

Total
 2016
 2017
 2018
 2019
 2020
 Total Employees

TOTAL

2016	4,327	4,327	4,327	4,327	4,327
2017	4,327	4,327	4,327	4,327	4,327
2018	4,327	4,327	4,327	4,327	4,327
2019	4,327	4,327	4,327	4,327	4,327
2020	4,327	4,327	4,327	4,327	4,327
TOTAL	21,635	21,635	21,635	21,635	21,635

APPENDIX G

B.S. - INTEGRATED PUBLIC RELATIONS AND ADVERTISING (CIP= 09.0900)

TOTAL DEGREE HOURS: 120

url: www.usf.edu/masscomm

The Bachelor of Science in Public Relations, Advertising, and Applied Communication will prepare students for leadership positions in the quickly evolving fields of public relations advertising, and integrated marketing communications and meet workforce demand. Graduates will understand the integrative nature of modern persuasive communication and be able to incorporate technology. Graduates will also find themselves assisting clients with strategic marketing and corporate strategies with absolute accountability in a vastly more complicated digital media environment.

STATE MANDATED COMMON COURSE PREREQUISITES

Students desiring to transfer to USF should complete an A.A. degree at a Florida College System institution. If students transfer with fewer than 60 semester hours of acceptable credit, the students must meet the University's entering freshman requirements including ACT or SAT test scores, GPA, and course requirements. Transfer students are also required to comply with the immunization, foreign language, and continuous enrollment policies of the university.

There are no State Mandated Common Prerequisites for this program.

REQUIREMENTS FOR THE MAJOR IN INTEGRATED PUBLIC RELATIONS AND ADVERTISING

TOTAL MAJOR HOURS: 48

Major requirements for the B.S. Degree:

Major Core (33 hours)

Required Core Courses in the School (27 credit hours)

- Take one of the following:
 - MMC 2100 Writing for the Mass Media
 - ADV 2214 Graphic Programs in Mass Communications
- ADV 3008 Introduction to Advertising
- PUR 3000 Principles of Public Relations
- ADV 3101 PR-Advertising Creativity (course name change proposal)
- ADV 3300 PR-Advertising Media Strategy (course name change proposal)
- PUR 3500 PR-Advertising Research (course name change proposal)
- MMC 3602 Mass Communications and Society
- MMC 4211 Media Law and Ethics
- Take one of the following:
 - ADV 4800 Advertising Campaigns
 - PUR 4801 Advanced Public Relations

Other Major Core Requirements (6 credit hours):

The following course is required outside the School to complete degree requirements:

- MAR 3023 Basic Marketing
- STA 2023 Introductory Statistics I

Major Electives (15 hours)

Choose 15 credit hours of coursework from the following list:

- ADV 3200 Advertising Design
- ADV 4204 Advanced Advertising Creativity

- ADV 4301 Advanced Media Strategy
- ADV 4310 Digital Media
- ADV 4600 Advertising Management
- ADV 4710 Portfolio Building
- MMC 4936 Special Topics in Mass Communications Studies
- ADV 4940 Internship
- PUR 4100 Writing for Public Relations
- PUR 4101 Public Relations Design and Production
- PUR 4401 Public Relations: Issues, Practices, and Problems
- PUR 4507 Persuasion in Digital Media
- RTV 4321 Electronic Field Production
- VIC 3001 Introduction to Visual Communications
- Or one (1) course from the Zimmerman School of Advertising & Mass Communications curriculum outside of those above, with advisor approval

Zimmerman School of Advertising and Mass Communications Faculty

Director: Wayne Garcia; Associate Director and Graduate Director: Art Ramirez; Professor: F. W. Pearce; Associate Professors: K. Burns, S. Liu, K. Page Werder, A. Ramirez, R. Watson; Assistant Professors: J. Applequist, J. Brown, K. Walker; Instructors: T. Bell, W. Garcia, C. Gugerty, K. Hawley, C. O'Brien, K. Arnold, D. Smith, W. Whitt; Visiting Faculty: J. Abrahamsen, A. Avant, A. Aytes, D. Bowen, G. Golan, K. Komarova, Ry. Watson; Clendinen Professor: Tim Drachlis; Courtesy Professor: J. Gathegi; Emerita: D. S. Bagley III, E.J. Friedlander, L. Z. Leslie, R. Miller, B. K. Petersen.

Agenda Item: FL 108

USF Board of Trustees
March 6, 2018

Issue: M.S. Learning Design and Technology – CIP 13.0501

Proposed action: Approval

Executive Summary: The field of learning technology is growing rapidly in higher education, industry, and K-12 settings. Nearly all major companies, government agencies, school districts, and universities and colleges are actively recruiting their own learning technology experts. The proposed M.S. in Learning Design and Technology (LD&T) degree program is designed to provide a comprehensive curriculum and intensive training to prepare students for the job market of today and emerging fields of tomorrow in K-12 schools, higher education, industry, military, and/or other governmental agencies. At the core of the proposed M.S. in LD&T is coursework which emphasizes the intersection of technological design and education, preparing students for a diverse set of roles across various training and educational contexts. As such, the proposed degree provides students with a broad base of leading-edge skills and techniques from the field of learning technology, while allowing them to choose specialized training from four concentrations, three of which are unique and not offered by other programs in the SUS system:

- E-Learning Design and Development (core area)
- Cybersecurity Education (unique)
- Big Data and Learning Analytics (unique)
- Game-based Learning and Analytics (unique)

Financial Impact: There will be no financial impact as this program will be supported through reallocation of existing departmental faculty and staff effort.

Strategic Goal(s) Item Supports:

- USF Tampa Strategic Plan Goal 1: Student Success

BOT Committee Review Date: February 13, 2018

Supporting Documentation Online (please circle):

Yes

No

[BOG Proposal](#)

USF System or Institution specific: USF Tampa

Prepared by: Yiping Lou, Ph.D., Associate Professor, College of Education

Board of Governors, State University System of Florida

Request to Offer a New Degree Program

(Please do not revise this proposal format without prior approval from Board staff)

University of South Florida

University Submitting Proposal

Fall 2018

Proposed Implementation Term

College of Education

Name of College(s) or School(s)

Educational & Psychological Studies

Name of Department(s)/ Division(s)

Instructional Technology

Academic Specialty or Field

M.S. in Learning Design and Technology

Complete Name of Degree

13.0501

Proposed CIP Code

The submission of this proposal constitutes a commitment by the university that, if the proposal is approved, the necessary financial resources and the criteria for establishing new programs have been met prior to the initiation of the program.

Date Approved by the University Board of Trustees **President** **Date**

Signature of Chair, Board of Trustees **Date** **Vice President for Academic Affairs** **Date**

Provide headcount (HC) and full-time equivalent (FTE) student estimates of majors for Years 1 through 5. HC and FTE estimates should be identical to those in Table 1 in Appendix A. Indicate the program costs for the first and the fifth years of implementation as shown in the appropriate columns in Table 2 in Appendix A. Calculate an Educational and General (E&G) cost per FTE for Years 1 and 5 (Total E&G divided by FTE).

Implementation Timeframe	Projected Enrollment (From Table 1)		Projected Program Costs (From Table 2)				
	HC	FTE	E&G Cost per FTE	E&G Funds	Contract & Grants Funds	Auxiliary Funds	Total Cost
Year 1	60	45	7,137.85	321,203	0	0	321,203
Year 2	82	61.5					
Year 3	106	79.5					
Year 4	116	87					
Year 5	136	102	3,459.10	352,828	0	0	352,828

Note: This outline and the questions pertaining to each section must be reproduced within the body of the proposal to ensure that all sections have been satisfactorily addressed. Tables 1 through 4 are to be included as Appendix A and not reproduced within the body of the proposals because this often causes errors in the automatic calculations.

INTRODUCTION**I. Program Description and Relationship to System-Level Goals**

- A. Briefly describe within a few paragraphs the degree program under consideration, including (a) level; (b) emphases, including majors, concentrations, tracks, or specializations; (c) total number of credit hours; and (d) overall purpose, including examples of employment or education opportunities that may be available to program graduates.**

(a) Level: The proposed program is a Master of Science (M.S.) in Learning Design and Technology (LD&T)

(b) Emphasis: E-Learning Design and Development; Cybersecurity Education; Big Data and Learning Analytics; and Game-Based Learning and Analytics

(c) Total number of credit hours: 33

(d) Overall purpose:

The field of learning technology is growing rapidly in higher education, industry, and K-12 settings. Nearly all major companies, government agencies, school districts, and universities and colleges are actively recruiting their own learning technology experts. The proposed M.S. in Learning Design and Technology (LD&T) degree is designed to provide a comprehensive curriculum and intensive training to prepare students for the job market of today and emerging fields of tomorrow in K-12 schools, higher education, industry, military, and/or other governmental agencies. At the core of the proposed M.S. in LD&T is coursework which emphasizes the intersection of technological design and education, preparing students for a diverse set of roles across various training and educational contexts. As such, the proposed degree provides students with a broad base of leading-edge skills and techniques from the field of learning technology, while allowing them to choose specialized training from a variety of emerging topical areas. Students can complete the program fully online or partially online.

Currently, USF offers an M.Ed. in Curriculum and Instruction with a concentration in Instructional Technology. Although the program is expanding, there are a growing number of applicants and current students interested in new concentration areas that are not currently offered through this Master's degree. Further, for students not looking to enter a traditional career track in education (e.g. teaching, K-12 roles, post-secondary schools), the M.S. is better suited for corporate, industry, marketing, software development, and other similar technology-rich fields. The proposed M.S. in Learning Design and Technology degree will better align with emerging trends in the field, market demands, and students' interests in industry, higher education and K-12 schools by providing four concentrations, three of which are unique and not offered by other programs in the SUS system:

- E-Learning Design and Development (core area)
- Cybersecurity Education (unique)
- Big Data and Learning Analytics (unique)
- Game-based Learning and Analytics (unique)

Each of the four concentrations will also be associated with a graduate certificate that students can earn as part of the M.S. program. Two of the certificates, E-learning Design and Development, and Cybersecurity Awareness and Education, have recently been approved. The other two certificates, Big Data and Learning Analytics, and Game-Based Learning and Analytics, are in the process of development.

Graduates from the M.S. in Learning Design and Technology degree will be in high demand as schools focus on evaluating and improving technology-based curricula, innovative and interactive content creation, and industry turns to e-learning for more efficient training delivery.

According to the Bureau of Labor Statistics (<https://www.bls.gov/ooh>), the national employment rate for instructional coordinators, training and development specialists, and training and development managers is expected to grow at 7% between 2014 and 2024. In Florida, the employment growth rate for the three occupational titles is projected to be higher than the national employment rate between 2016 and 2024, showing 12.4%, 13.2%, and 14.2% growth respectively (Florida Department of Economic Opportunity: <http://www.floridajobs.org/labor-market-information/data-center/statistical-programs/employment-projections/>).

Jobs in cybersecurity, a field that has broadened and diversified, are expected to grow 18% between 2014 and 2024. There is an increasing understanding that cybersecurity can no longer be the sole domain of the technical - that the most persistent and significant challenges, threats, and harms faced today can only be addressed from a sociotechnical perspective, and often only through an emphasis on training and usability. One strong example is the ever-growing problem of phishing, which fundamentally is a non-technical training and awareness issue. The cybersecurity concentration within the LD&T major will position College of Education students to accept key cybersecurity positions emphasizing training and awareness, actively facilitating cultures of cybersecurity across institutional contexts.

With increased reliance on assessment and performance metrics, professionals in education are required to have skills in understanding, using, and interpreting data in order to measure student learning and success. Our new concentration in big data and learning analytics will help students develop these necessary skills.

As new generations of learners grow up with digital media and games, game-based learning is becoming increasingly popular in K-12 schools, higher education, and industry training. However, high quality digital games that both motivate students and promote creative higher-level thinking and problem-solving are still hard to find. The concentration in game-based learning and analytics will help our students develop skills in applying learning design skills and innovative technologies in the development and evaluation of digital games and analytics to meet the emerging market demand.

- B. Please provide the date when the pre-proposal was presented to CAVP (Council of Academic Vice Presidents) Academic Program Coordination review group. Identify any concerns that the CAVP review group raised with the pre-proposed program and provide a brief narrative explaining how each of these concerns has been or is being addressed.**

The pre-proposal was presented at the April 14, 2017 CAVP meeting and the CAVP had no concerns.

If this is a doctoral level program please include the external consultant's report at the end of the proposal as Appendix D. Please provide a few highlights from the report and describe ways in which the report affected the approval process at the university.

N/A

- C. Describe how the proposed program is consistent with the current State University System (SUS) Strategic Planning Goals. Identify which specific goals the program will directly support and which goals the program will indirectly**

support (see link to the SUS Strategic Plan on the resource page for new program proposal).

The proposed M.S. program directly supports the SUS Strategic Plan for 2025 in (1) Teaching & Learning, (2) Scholarship, Research, Innovation, and (3) Community and Business Engagement.

(1) Teaching and Learning

The proposed M.S. in LD&T will include curriculum in four concentrations that align with the emerging trends and growing needs: E-Learning Design and Development, Cybersecurity Education, Big Data Learning Analytics, and Game-Based Learning and Analytics. Students will gain theoretical knowledge of cognitive learning, motivational design, and develop skills in using emerging technologies in designing, developing and analyzing a variety of e-learning outcomes. Unique course offerings include Digital Identity, Digital Media and Learning, Game Development for Learning, Game Analytics for Learning, Cybersecurity and Digital Citizenship, and Data Modeling and Visualization. Students will learn not only content but the use of innovative pedagogies and technologies in course design and delivery. The major also includes a service-learning course that provides students with real-world design and development opportunities and experiences. The new master's degree includes a final portfolio-based assessment to more effectively foster student creativity, critical thinking and problem-solving skills as global citizens. The proposed major, with strengthened quality and reputation, especially for the nationally unique offering of Cybersecurity Education, will improve the quality and relevance of the System's institutions with state, national, and international preeminence. It will increase the number of degrees awarded in much needed Science, Technology, Engineering, and Math (STEM) fields.

Our degree contributes substantially to STEM areas by providing people with the technical skills and knowledge to start understanding our digital world beyond a surface black box level. For example as part of our Web Programming and Design course, a student will be able to learn how to program javascript in web-pages (a vital skill for any web developer that is growing in demand) and view the source code of virtually any web page and understand how the web really works. Similarly, in our current great age of accelerations (technological, internationalism, climate change, etc. according to Friedman, 2016), students taking our big data analysis course will begin to be able to access and make sense of large data streams, which are actually freely available to anyone with the knowledge and skills. Students who complete our concentration in cybersecurity can help protect and help educate others in keeping our digital sphere safe. In one of our service-learning courses, students apply the skills they learned in designing, developing and evaluating e-learning in real world projects. In the last several years, students have participated in developing a series of science inquiry games and e-learning modules for middle and high school students in collaboration with science teachers and faculty as part of several federal grants that the IT faculty received.

(2) Scholarship, Research, and Innovation

The faculty members in the major are active researchers and have been successful in obtaining federal research grants. Recently funded grants include: National Science Foundation (NSF)- *Climate Change Narrative Game Education* (PI & Co-PI, \$500,000), NSF - *Water Awareness Research and Education* (Co-PI, \$499,972), Institute of Educational Sciences - *Professional Development of an MTSS Model for Early Childhood Educators to Prevent Reading Disabilities* (Co-PI, \$1,400,000), US Department of Education - *K-12 Math and Science Partnership* (PI, \$770,066), NSF/NSA *GenCyber*

(PL \$100,000), and NSF - SaTC: *CORE: Small: A Privacy-Preserving Meta-Data Analysis Framework for Cyber Abuse Research-Foundations, Tools and Algorithms* (Co-PL \$498,333).

Innovative curricula and important research findings have been generated from each of these grants and other research projects. The grants also provided opportunities for graduate students to participate in cutting-edge research projects that are applied to improve teaching and student learning in the real world. The proposed M.S. in LD&T with four concentrations will better establish the program as leaders in the field of design and development of learning technologies, and further increase opportunities for collaborative research and external funding. As stated in (2) above, in one of our service-learning courses, students apply the skills they learned in the program in designing, developing and evaluating science inquiry games and e-learning modules for middle and high school students in collaboration with science teachers and faculty as part of several federal grants that the IT faculty received. This not only helps the students to gain real world experience in designing and developing innovative technology-based software and applications, they also participate in the cutting-edge STEM research that has potential to impact the future of STEM education.

(3) Community and Business Engagement

The major will involve community and business engagement through service-learning course work, grant participation, and internships. Coursework, especially those involving client-based service learning, will challenge students to conduct research and be innovative in designing solutions for real-world problems in education and professional development. For example, graduates from the current M.Ed. Instructional Technology Concentration have become a major part of the instructional design team within USF's Innovative Education department. New partnerships with Innovative Education include service learning and internships. Additionally, plans have already been made for those in the big data courses to work with actual (de-identified) data from the USF Office of Student Success and use course projects to support USF initiatives to foster student retention and graduation. One of the IT faculty members serves as the Florida Cybersecurity Center (FC2) Community and Outreach Liaison. For the last two years, we offered a Cybersecurity Summer Camp for high school students in collaboration with USF Whitehatters and Florida Center for Instructional Technology. Through several federal research grants, faculty and students are creating partnerships with local school districts to develop innovative learning environments, such as science inquiry learning games, augmented reality on alternative energies, and providing cybersecurity training to students and professional development to teachers. Internship opportunities have been established with USF Innovative Education and USF School of Nursing in online course design and development. Other internship opportunities such as with e-learning companies outside USF, Florida Cybersecurity Center, and Florida Center for Instructional Technology, are being explored.

- D. If the program is to be included in a category within the Programs of Strategic Emphasis as described in the SUS Strategic Plan, please indicate the category and the justification for inclusion.**

The Programs of Strategic Emphasis Categories:

1. Critical Workforce:
 - Education
 - Health

- Gap Analysis
- 2. Economic Development:
 - Global Competitiveness
- 3. Science, Technology, Engineering, and Math (STEM)

Please see the Programs of Strategic Emphasis (PSE) methodology for additional explanations on program inclusion criteria at the resource page for new program proposal.

The proposed M.S. in Learning Design and Technology is included in the SUS Strategic Emphasis (PSE) category 3: Science, Technology, Engineering, and Math (STEM).

The program provides training of educational technology professionals who play a leading role in the design, development, evaluation of learning technologies, learning analytics, and cybersecurity in K-12 schools, higher education, and industry.

F. Identify any established or planned educational sites at which the program is expected to be offered and indicate whether it will be offered only at sites other than the main campus.

The degree will only be offered at the USF-Tampa campus.

INSTITUTIONAL AND STATE LEVEL ACCOUNTABILITY

II. Need and Demand

- A. Need: Describe national, state, and/or local data that support the need for more people to be prepared in this program at this level. Reference national, state, and/or local plans or reports that support the need for this program and requests for the proposed program which have emanated from a perceived need by agencies or industries in your service area. Cite any specific need for research and service that the program would fulfill.**

MARKET DEMAND

The field of learning technology is growing rapidly in higher education, industry, and K-12 settings. Nearly all major companies, government agencies, school districts, and universities and colleges are actively recruiting their own learning technology experts.

According to Burning Glass Program InsightsSM, 7,314 jobs for instructional technology (ITECH) professionals have been posted nationally within the last twelve months. While California, Massachusetts, and Texas were the top three, Florida ranked fourth in the nation for states with the greatest demand for ITECH graduates. When considering demand in terms of metropolitan areas, Orlando-Kissimmee-Sanford ranked eighth in the nation.

Revised December 1, 2014



TOP HIRING INDUSTRIES

Other, which consists of corporate-related positions, accounted for 41% of the jobs posted in Florida, followed by Colleges, Universities, Professional Schools (36%), Elementary and Secondary Schools (11%), Traveler Accommodations (6%) and Junior Colleges (5%).



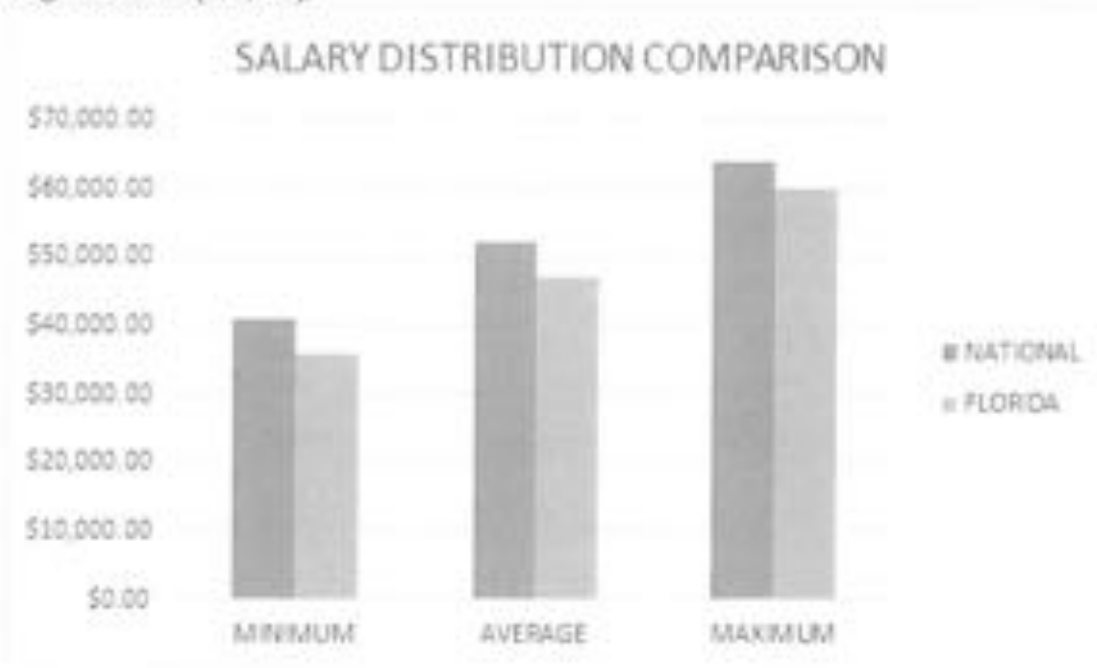
JOB TITLES

According to Burning-Glass Program Insight the nationwide employment opportunities in the last twelve months advertised for the following positions with the corresponding amount of professional experience:

REQUIRED EXPERIENCE	NATIONWIDE	FLORIDA
0 TO 2 YEARS OF EXPERIENCE	<ul style="list-style-type: none"> • Instructional Designer • Curriculum Designer • Instructional Design Specialist 	<ul style="list-style-type: none"> • Instructional Designer • Instructional Design eLearning • Learning Specialist
3 TO 5 YEARS OF EXPERIENCE	<ul style="list-style-type: none"> • Instructional Designer • Curriculum Designer • Curriculum Manager 	<ul style="list-style-type: none"> • Instructional Designer • Curriculum Designer • Instructional Facilitator
6 TO 8 YEARS OF EXPERIENCE	<ul style="list-style-type: none"> • Instructional Designer • Curriculum Designer • Curriculum Manager 	<ul style="list-style-type: none"> • Instructional Designer • Instructional Design Assistant • Literacy Coach - High
9+ YEARS OF EXPERIENCE	<ul style="list-style-type: none"> • Instructional Designer • Sales Consultant • Instructional Coach 	<ul style="list-style-type: none"> • Instructional Designer

SALARY

Based on Burning Glass models that considered advertised job posting salaries, BLS data and other proprietary and public sources of information, the national average for ITECH graduates is \$51,604. Compared to the national average, ITECH graduates in Florida can anticipate a slightly lower average of \$46,876. While lower than the national average, it is still considered above the living wage for Florida (\$30,000).



The national range for ITECH graduates is between the minimum of \$41,000 and the maximum of \$64,000. The range of compensation in Florida is between the minimum of \$36,000 and the maximum of \$60,000.

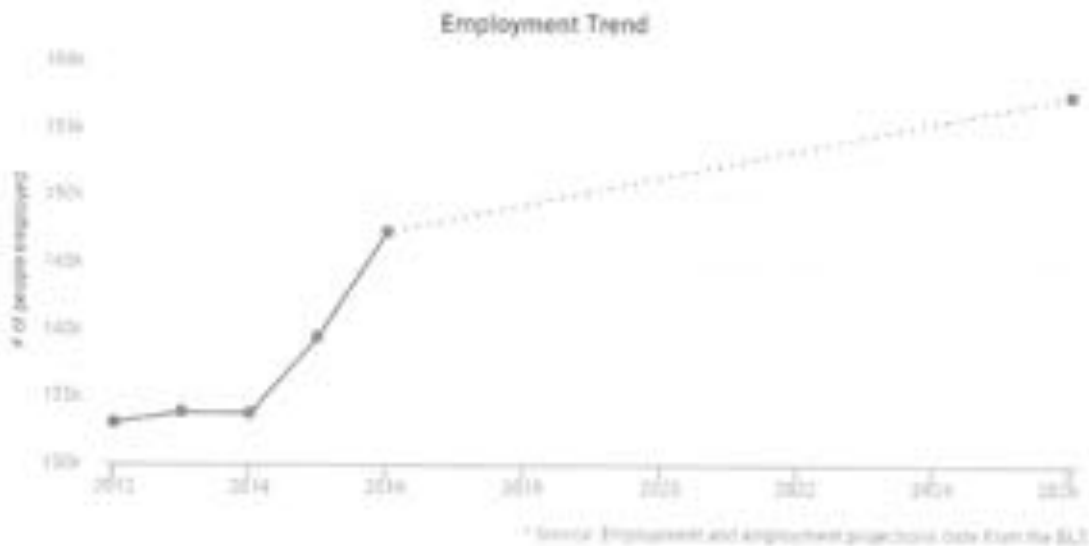
Revised December 8, 2016

JOB TITLE	NATIONAL SALARY RANGE	FLORIDA SALARY RANGE
Instructional Designer	\$69,000	\$61,000
Instructional Technologist	\$57,000	Unavailable
Curriculum Designer	\$61,000	Unavailable
Instructional Facilitator	\$50,000	Unavailable
Curriculum Manager	\$73,000	Unavailable
Learning Specialist	\$57,000	\$46,000
Educational Consultant	\$66,000	Unavailable

POTENTIAL JOB GROWTH

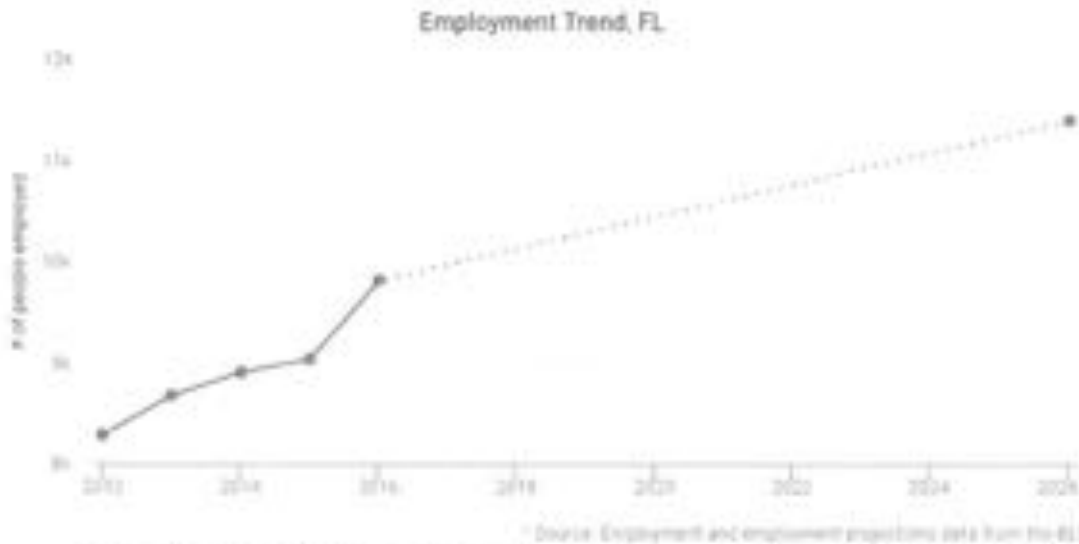
NATIONAL LONG-TERM OCCUPATIONAL PROJECTION

Based on the previous employment and current employment projections data from the BLS, nationally, the job outlook for ITECH-related occupations grew by 5.6% from 2015 to 2016. Average relative growth at a rate of 6.9% is projected from 2017 to 2026.



FLORIDA LONG-TERM OCCUPATIONAL PROJECTION

Based on the previous employment and current employment projections data from the BLS, the job outlook for ITECH-related occupations in Florida grew by 8.6% from 2015 to 2016. Average relative growth at a rate of 16.1% is projected from 2017 to 2026.



In one of our concentrations, jobs in cybersecurity such as information security analysts are expected to grow 18% between 2014 and 2024. There is an increasing understanding that cybersecurity can no longer be the sole domain of the technical - that the most persistent and significant challenges, threats, and harms faced today can only be addressed from a sociotechnical perspective, and often only through an emphasis on training and usability. The cybersecurity concentration within the LD&T degree will position College of Education students to accept key cybersecurity positions emphasizing training and awareness, actively facilitating cultures of cybersecurity across institutional contexts.

B. Demand: Describe data that support the assumption that students will enroll in the proposed program. Include descriptions of surveys or other communications with prospective students.

The current M.Ed. in Curriculum and Instruction with Concentration in Instructional Technology has a total of 60 students. Thirty-seven of these students were admitted in 2017, a 95% increase from 2016. In a recent survey of the student preferences, of the 20 new students who responded, 70% stated that they would opt into the new M.S. degree in Learning Design and Technology, 10% were undecided, and 20% would prefer to remain in the M.Ed. Concentration in Instructional Technology.

The proposed M.S. in LD&T offers a comprehensive curriculum and intensive training to prepare students for the job market of today and emerging fields of tomorrow in K-12 schools, higher education, industry, and military where the design, development, implementation, and evaluation of online learning, game-based learning, cybersecurity education, and learning analytics take place. Graduates will be in high demand as schools focus on evaluating and improving technology-based curricula, game-based learning and student awareness of institutions increase online course design and delivery, innovative and interactive content creation, and educational technology implementation; and industry turns to e-learning including games for more efficient training delivery. Most graduates from our current M.Ed. concentration in the last five years are working in jobs including: instructional designers, curriculum developers, learning technology specialists, and senior e-learning and

Revised December 8, 2016

training developers. Some have achieved managerial positions in IT, such as vice president, training director, and instructional design project manager. Some have entered doctoral programs.

In the state, FSU offers an M.S. in Instructional Systems and Learning Technologies. The number of students enrolled in the program was 65 in Fall 16. Nationally, Indiana University offers a Master of Science in Instructional Systems Technology, and the enrollment was 27 in Fall 16. Currently, we have about 70 students in the M.Ed. in Curriculum & Instruction with concentration in Instructional Technology.

The coursework will meet professional credentialing requirements offered through the State of Florida and professional associations such as Association for Educational Communication & Technology, and International Society for Technology in Education.

- C. If substantially similar programs (generally at the four-digit CIP Code or 60 percent similar in core courses), either private or public exist in the state, identify the institution(s) and geographic location(s). Summarize the outcome(s) of communication with such programs with regard to the potential impact on their enrollment and opportunities for possible collaboration (instruction and research). In Appendix C, provide data that support the need for an additional program.**

Although there are four universities (FAU, FSU, UCF, and UWF) in the SUS that currently have a master's degree with the same CIP (11.0501) in instructional technology, none of these programs offer the three new concentrations that will be offered in the proposed M.S. in LD&T degree: Cybersecurity Education, Big Data and Learning Analytics, and Game-Based Learning and Analytics.

	Degree	Enrollment 2016
FAU	M.Ed. in Instructional Technology	3
FSU	M.S. in Instructional Systems & Learning Technologies	65
UCF	M.A. in Instructional Design and Technology SPECIALIZATION(S): <ul style="list-style-type: none"> • Educational Technology • e-learning • Instructional Systems 	119
UWF	M.Ed. in Instructional Design and Technology SPECIALIZATION(S): <ul style="list-style-type: none"> • Instructional Technology • Technology Leadership 	27

USF M.Ed. Concentration in Instructional Technology enrolled 19 new students in 2016. In 2017, we enrolled 37 new students, a 95% increase. With three new and unique concentrations in Cybersecurity Education, Big Data and Learning Analytics, and Game-Based Learning and Analytics in addition to the core of e-learning design and development, the proposed M.S. degree in LD&T will meet a growing need in the emerging high demand job market in K-12, higher education, and industry.

Many occupations in the United States will be replaced by robots and artificial intelligence in the next ten to twenty years (according to Thomas Friedman's book Thank you for being late,

2016). However, the skills that will place individuals in **high demand** in the future are a **combination of technical skills and people skills**. Our proposed master's degree, in contrast to others in Florida, provides students with training in cutting edge technical skills. These include Web Programming, big data analysis, game programming, game analytics and cyber-security skills. Our new master's program also provides extensive people skills and management skills. For instance, two of our required courses (EDF 6284 Problems in Instructional Design for Computers, and EME 6613 Development of Technology-Based Instruction) teach students to design and develop complex computer-based educational media in the context of a group, requiring excellent interpersonal communication, management skills, and coordination and integration of work products. Furthermore, EME 6613 is a client-based service-learning course that provides students with real world project opportunities to develop skills in conducting needs assessment, meeting their e-learning design and development needs.

Innovations in training methods and learning technology should continue throughout the next decade. For example, organizations increasingly use social media, visual simulations, mobile learning, and social networks in their training programs. As companies seek to reduce costs, training and development managers will be required to structure programs to enlist available experts, take advantage of existing resources, and facilitate positive relationships among staff. Training and development managers will use informal collaborative learning and social media to engage and train employees in the most cost effective way.

- D. Use Table 1 in Appendix A (1-A for undergraduate and 1-B for graduate) to categorize projected student headcount (HC) and Full Time Equivalents (FTE) according to primary sources. Generally undergraduate FTE will be calculated as 30 credit hours per year and graduate FTE will be calculated as 24 credit hours per year. Describe the rationale underlying enrollment projections. If students within the institution are expected to change majors to enroll in the proposed program at its inception, describe the shifts from disciplines that will likely occur.**

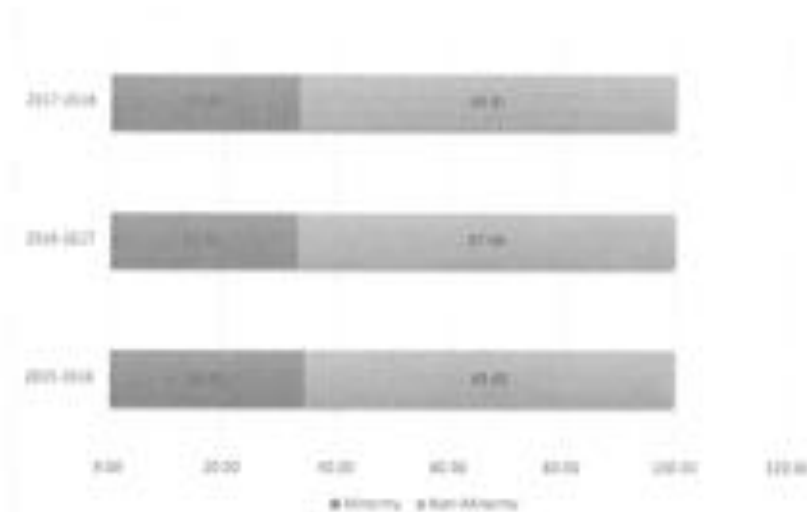
Individuals from agencies/industries in the service area (e.g., K-12 school teachers, employees of higher educational institutions, employees in industries and governmental agencies, including the military) who have bachelor degrees and are interested in learning design and technology are expected to apply. Based on a recent survey of our 2017 newly admitted students in the M.Ed. program in Curriculum and Instruction with Concentration in Instructional Technology, 70% would like to transfer into the new M.S. degree in Learning Design and Technology when it is open for enrollment in Fall 2018. We expect 2-4 students in other master degree programs such as gifted education and adult education at USF to transfer into the proposed degree in years 2-5. As there are no other universities offering concentrations in Cybersecurity Education, Big Data and Learning Analytics, and Game-Based Learning in the state, we expect to enroll students who have graduated from USF and other Florida public and private institutions, as well as out-of-state and international applicants.

- E. Indicate what steps will be taken to achieve a diverse student body in this program. If the proposed program substantially duplicates a program at FAMU or FIU, provide, (in consultation with the affected university), an analysis of how the program might have an impact upon that university's ability to attract students of races different from that which is predominant on their campus in the subject program. The university's Equal Opportunity Officer shall review this section of the proposal and then sign and date Appendix B to indicate that the analysis required by this subsection has been completed.**

Approved December 6, 2016

The USF system encourages applications for admission from all qualified applicants and does not discriminate based on race, color, marital status, sex, religion, national origin, disability, age, sexual orientation, veteran status, genetic information, and gender identity and expression, or as otherwise prohibited by state or federal law, in the admission process. The Department of Educational and Psychological Studies (EPS) has a longstanding commitment to developing professionals with the knowledge/skills/dispositions to work with increasingly diverse populations and to provide a student-oriented learning community with opportunities for cultural, intellectual, social, economic, and ethnic development.

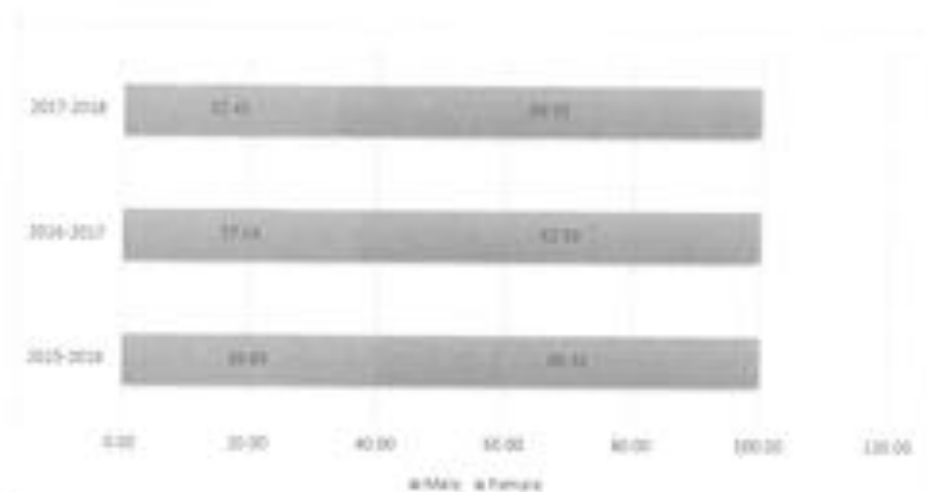
To cultivate diversity in the proposed M.S. in Learning Design and Technology, recruiting efforts will be planned and carried out not only in the university's service areas (Hillsborough, Hernando, Pasco, Pinellas, Polk, Manatee, Sarasota counties) but also in other geographic regions. Program faculty and staffs will use multiple recruitment strategies to ensure diversity in the program (i.e. displays of detailed program information (flyer, brochures, etc.) at the Annual graduate program sessions; in-person recruitment of particularly talented underrepresented students at professional conferences; personal and email announcements within research networks; working with USF Innovative Education office to develop new certificate programs for diverse career needs). The EPS department and the university marketing team will continue to implement a comprehensive marketing campaign to promote the proposed program and recruit underrepresented population of prospective students from the local areas, state, nationally and internationally. Faculty members' international networks are a valuable resource in this respect. Figures presented below show that the EPS department has been successfully recruiting a diverse student body to its' graduate programs. The new program is also expected to continue the recruiting efforts to achieve the desired student diversity.



Diversity in the EPS department graduate programs for the past three years (Ethnicity)

Data source: USF InfolCenter: <http://infohub.usf.edu/DIVERSITYCENTER/>

Revised December 8, 2016



Diversity in the EPS department graduate programs for the past three years (Gender)

Data source: OSF InfoCenter: <http://osfweb.usf.edu/OSF/INFOCENTER/>

III. Budget

- A. Use Table 2 in Appendix A to display projected costs and associated funding sources for Year 1 and Year 5 of program operation. Use Table 3 in Appendix A to show how existing Education & General funds will be shifted to support the new program in Year 1. In narrative form, summarize the contents of both tables, identifying the source of both current and new resources to be devoted to the proposed program. (Data for Year 1 and Year 5 reflect snapshots in time rather than cumulative costs.)**

Table 2 shows the cost of the new degree program. It is important to note that the concentration in Instructional Technology (M.Ed. in Curriculum and Instruction) will be phased out so there will be no additional cost of new program in Year 1 and minimal cost increase in Year 5. Currently three faculty members regularly teach students in the M.Ed. program and this will stay the same for the new M.S. degree. Other faculty in the department and college offer foundational courses or electives that are also taken by students in other majors. Therefore faculty effort dedicated to this degree program is somewhat inflated in Table 4. Table 3 displays the reallocated budget from EPS as well as the other units' offering courses in the concentration. Several courses offered in program's concentration will be enrolling students outside the program who are either electing to take or applying courses towards one of several graduate certificates. Please note one program faculty's salary is paid by the Florida Center for Cyber-Security.

- B. Please explain whether the university intends to operate the program through continuing education, seek approval for market tuition rate, or establish a differentiated graduate-level tuition. Provide a rationale for doing so and a timeline for seeking Board of Governors' approval, if appropriate. Please include the expected rate of tuition that the university plans to charge for this program and use this amount when calculating cost entries in Table 2.**

The university does not intend to operate the program through continuing education. We will not be seeking approval for market tuition rate, nor will we be establishing a differentiated graduate-

level tuition.

- C. If other programs will be impacted by a reallocation of resources for the proposed program, identify the impacted programs and provide a justification for reallocating resources. Specifically address the potential negative impacts that implementation of the proposed program will have on related undergraduate programs (i.e., shift in faculty effort, reallocation of instructional resources, reduced enrollment rates, greater use of adjunct faculty and teaching assistants). Explain what steps will be taken to mitigate any such impacts. Also, discuss the potential positive impacts that the proposed program might have on related undergraduate programs (i.e., increased undergraduate research opportunities, improved quality of instruction associated with cutting-edge research, improved labs and library resources).

There will be no negative impacts due to reallocation of resources. The proposed program will not have an impact on undergraduate programs. Currently, Instructional Technology has one undergraduate course that is taught by doctoral students in the instructional technology Ph.D. concentration under the supervision of the full-time instructor.

- D. Describe other potential impacts on related programs or departments (e.g., increased need for general education or common prerequisite courses, or increased need for required or elective courses outside of the proposed major).

As a result of the new program, the M.Ed in Instructional Technology will be phased out. Under the M.Ed program, students are required to take a 9-hour core offered by other programs in the department (Educational Measurement, Educational Psychology/Social Foundations) and college (Educational Leadership). Educational Measurement faculty is creating a new 3-hour course to serve the core of the new program. As the other 6 hours are required by all concentrations under the M.Ed in Curriculum and Instruction in the college, the effect of phasing out one concentration will be marginal. Moreover, the new program's concentrations (Big Data Learning Analytics and Cybersecurity Education) requires courses offered by program areas in other departments (Social Studies Education in the Department of Teaching and Learning and Higher Education in the Department of Leadership, Counseling, Adult, Career and Higher Education). Therefore the new program will support courses in other areas. The faculty from these areas have been involved in the development of the new program since the initial planning stages with the approval of their respective Department Chairs.

- E. Describe what steps have been taken to obtain information regarding resources (financial and in-kind) available outside the institution (businesses, industrial organizations, governmental entities, etc.). Describe the external resources that appear to be available to support the proposed program.

The core faculty members in the major are active researchers and have been successful in obtaining federal research grants. Recently funded grants include: National Science Foundation (NSF)- Climate Change Narrative Game Education (PI & Co-PI, \$500,000), NSF - Water Awareness Research and Education (Co-PI, \$499,972), Institute of Educational Sciences - Professional Development of an MTSS Model for Early Childhood Educators to Prevent Reading Disabilities (Co-PI, \$1,400,000), US Department of Education - K-12 Math and Science Partnership (PI, \$770,066), NSF/NSA GeoCyber

(PI, \$100,000), and NSF - SaTC- CORE: *Small: A Privacy-Preserving Meta-Data Analysis Framework for Cyber Abuse Research-Foundations, Tools and Algorithms* (Co-PI, \$498,333). These grants support faculty research, student participation in innovative projects, and graduate student assistantships.

The program faculty is affiliated with The Florida Center for Instructional Technology (FCIT). FCIT regularly provides graduate assistantship opportunities to the master's degree students in the program.

One of the core program faculty members is an active member in the Florida Center of Cybersecurity (FC²). He serves as FC² Community & Outreach Liaison. He also organizes FC² Cybersecurity Summer Camps for high school students and teachers. This will provide excellent opportunities for graduate students in the Cybersecurity Education Concentration such as internships and assistantships.

Another faculty member in the Department of Educational and Psychological Studies has been awarded multi-year multi-million dollar state grants, *Technology and Learning Connections (TLC)*, as a part of Florida's *Multi-Tiered System of Supports (MTSS)* through the *Problem Solving/Response to Intervention Project* at the University of South Florida. The TLC Team provides guidelines and resources to support the implementation of the Florida standards, assistive and instructional technology, accessible instructional materials, and universal design for learning (UDL) for schools throughout the state. Discussions are underway with the PI and Director of the TLC team for collaboration opportunities such as participation of the graduate students in the M.S. program in the design, development, implementation, and evaluation of assistive technologies and UDL for schools in Florida.

IV. Projected Benefit of the Program to the University, Local Community, and State

Use information from Tables 1 and 2 in Appendix A, and the supporting narrative for "Need and Demand" to prepare a concise statement that describes the projected benefit to the university, local community, and the state if the program is implemented. The projected benefits can be both quantitative and qualitative in nature, but there needs to be a clear distinction made between the two in the narrative.

The new program as a Master's of Science (STEM) will better serve student needs as well as the needs of the economy where there is high demand for individuals with graduate training in Learning design, learning technologies, educational gaming, big data learning analytics and cyber-security.

V. Access and Articulation – Bachelor's Degrees Only

- A. If the total number of credit hours to earn a degree exceeds 120, provide a justification for an exception to the policy of a 120 maximum and submit a separate request to the Board of Governors for an exception along with notification of the program's approval. (See criteria in Board of Governors Regulation 6C-8.014)**

N/A

- B. List program prerequisites and provide assurance that they are the same as the approved common prerequisites for other such degree programs within the SUS (see link to the Common Prerequisite Manual on the resource page for new program proposal). The courses in the Common Prerequisite Counseling Manual are intended to be those that are required of both native and transfer students prior to entrance to the major program, not simply lower-level courses that are required prior to graduation. The common prerequisites and substitute courses are mandatory for all institution programs listed, and must be approved by the Articulation Coordinating Committee (ACC). This requirement includes those programs designated as "limited access."

If the proposed prerequisites are not listed in the Manual, provide a rationale for a request for exception to the policy of common prerequisites. NOTE: Typically, all lower-division courses required for admission into the major will be considered prerequisites. The curriculum can require lower-division courses that are not prerequisites for admission into the major, as long as those courses are built into the curriculum for the upper-level 60 credit hours. If there are already common prerequisites for other degree programs with the same proposed CIP, every effort must be made to utilize the previously approved prerequisites instead of recommending an additional "track" of prerequisites for that CIP. Additional tracks may not be approved by the ACC, thereby holding up the full approval of the degree program. Programs will not be entered into the State University System Inventory until any exceptions to the approved common prerequisites are approved by the ACC.

N/A

- C. If the university intends to seek formal Limited Access status for the proposed program, provide a rationale that includes an analysis of diversity issues with respect to such a designation. Explain how the university will ensure that Florida College System transfer students are not disadvantaged by the Limited Access status. NOTE: The policy and criteria for Limited Access are identified in Board of Governors Regulation 6C-8.013. Submit the Limited Access Program Request form along with this document.

N/A

- D. If the proposed program is an AS-to-BS capstone, ensure that it adheres to the guidelines approved by the Articulation Coordinating Committee for such programs, as set forth in Rule 6A-10.024 (see link to the Statewide Articulation Manual on the resource page for new program proposal). List the prerequisites, if any, including the specific AS degrees which may transfer into the program.

N/A

INSTITUTIONAL READINESS

VI. Related Institutional Mission and Strength

- A. Describe how the goals of the proposed program relate to the institutional mission statement as contained in the SUS Strategic Plan and the University

Strategic Plan (see link to the SUS Strategic Plan on the resource page for new program proposal).

The primary goal of the proposed M.S. program is to provide a comprehensive curriculum and intensive training to prepare students for a variety of professional careers in one of the high demand STEM fields related to learning technology design, development, implementation, and evaluation. This goal strongly aligns with USF's mission "to deliver competitive undergraduate, graduate, and professional programs, to generate knowledge, foster intellectual development, and ensure student success in a global environment."

The M.S. in LD&T supports Goals 1, 2, 3 and 4 in the USF Strategic Plan.

Goal 1. Well-educated and highly skilled global citizens through our continuing commitment to student success:

The M.S. in LD&T program will include curriculum in the core discipline of instructional technology with four concentrations: E-learning Design and Development, Cybersecurity Education, Big Data Learning Analytics, and Game-Based Learning. Students will gain theoretical knowledge of cognitive learning, motivational design, and develop skills in using emerging technologies in designing, developing and analyzing a variety of e-learning outcomes. Unique course offerings include Digital Identity, Digital Media and Learning, Game Development for Learning, Cybersecurity and Digital Citizenship, and Data Modeling and Visualization. Students will learn not only content but use of innovative pedagogies and technologies in the course design and delivery. The program also includes a service-learning course that provide students with real world design and development opportunities and experiences and a portfolio-based assessment to more effectively foster student creativity, critical thinking and problem-solving skills as global citizens.

The nature and content of the LD&T program readily lend itself to global citizenship objectives. One aspect of being a global citizen is self-awareness with regard to values, beliefs, attitudes, and behaviors. Self-awareness is prevalent in examining and defining personal beliefs by reflecting upon and auditing their own digital identity, digital footprint, and digital shadows in cybersecurity, as well as reaching out and interacting with others/self-examining through Internet-based projects and creations. Another aspect of "being global" is the ability to analyze global and cultural interrelationships and interdependencies across place and time (and, thus, analyze cultures as complex systems shaped by relations of power and interdependence). Course objectives in LD&T achieve this goal in several ways, most notably by examining the ways digital identity, digital systems, technological advances, and mass media affect the human experience and decision-making across multiple cultures, racial and gender groups, and nations. In achieving the "practice" of global citizenship, LD&T students are afforded the ability to put into action professed values, beliefs, and attitudes that express concern for others in coursework. These coursework pieces include the creation of and participation in heterogeneous online discussion forums, asynchronous communication with classmates and experts throughout the world, synchronous online communications with students of a plethora of backgrounds, and creation of technology-based spaces available to the entire world through the Internet.

Goal 2. High-impact research and innovation to change lives, improve health, and foster sustainable development and positive societal change:

The M.S. in LD&T program with its core program and four concentrations will better establish the

program as leaders in the field of design and development of learning technologies. The program will involve collaboration with IT faculty and faculty across the university in teaching, research, and grant procurement. Coursework, especially those involving client-based service learning, will challenge students to conduct research and be innovative in designing solutions for real-world problems in education and professional development.

Goal 3. A highly effective, major economic engine, creating new Partnerships to build a strong and sustainable future for Florida in the global economy:

New partnerships with several USF units are being explored. Graduates from the current M.Ed. program in IT Concentration have become a major part of the instructional design team at the USF Innovative Education. New partnerships with Innovative Education include service learning and internships. Several programs including M.S. in Information Studies and Ed.D. in Education Innovation are discussing to include IT courses as electives or cognate. Through research grants, faculty and students are creating partnerships with local school districts in developing innovative learning environments and providing professional development to teachers. Discussions are under way with USF School of Business in including their course work on Analytics and Business Intelligence Certificate as part of electives for the Big Data and Learning Analytics Concentration. Other internship opportunities such as e-learning companies outside USF and Florida Cybersecurity Center are being explored.

Goal 4. Sound financial management to establish a strong and sustainable economic base in support of USF's continued academic advancement:

The program has been working with the marketing team at USF Innovative Education in creating branding and increasing recruitment. A new program website has been developed. The M.S. in LD&T will help develop branding in not only the program as a whole but also the four concentrations, esp., cybersecurity awareness education that are unique in the state and nationally.

II. Describe how the proposed program specifically relates to existing institutional strengths, such as programs of emphasis, other academic programs, and/or institutes and centers.

The proposed program connects to a variety of institutional strengths and academic programs, including cybersecurity, instructional technology, gaming, and data and learning analytics.

As currently outlined, the program will offer a track for students pursuing a more specialized interest in cybersecurity. One of our faculty members, Dr. Nathan Fisk, currently serves as the Community and Outreach Liaison for the Florida Center for Cybersecurity (FC2). Fisk will draw on the expertise of the center to enhance the cybersecurity track through the program, additionally positioning coursework for a planned COEDU concentration in the growing Cybersecurity MS program. There is an increasing understanding that cybersecurity can no longer be the sole domain of the technical - that the most persistent and significant challenges, threats, and harms faced today can only be addressed from a sociotechnical perspective, and often only through an emphasis on training and usability, topics for which students in this program will be uniquely prepared.

Further, the program will connect to ongoing initiatives at the Florida Center for Instructional Technology (FCIT). Established in 1982, the FCIT has been a leader in working with educators to integrate technology into the curriculum for over forty years, serving hundreds of

thousands of teachers across the state. FCIT's experiences working with teachers to more effectively integrate technology into their classrooms led to the development of the Technology Integration Matrix, a practical guide for teachers striving to develop experiential, interactive experiences in their classrooms using information technology. In the past, FCIT has offered valuable experience to our students via graduate assistantship programs, and the proposed program will continue this relationship.

Finally, USF has recently been recognized by the Chronicle of Higher Education as number one among 4-year public colleges and universities for the greatest improvement in 6-year graduation rates. The accomplishment was due in great part to the predictive analytics model created by the Office of Student Success that identifies students at risk and then offers them the support and resources that they need to succeed. Students in the big data and learning analytics concentration will be taught by faculty who were involved in developing this model and have opportunities to work with the Office of Student Success on new projects, using actual data.

- C. Provide a narrative of the planning process leading up to submission of this proposal. Include a chronology in table format of the activities, listing both university personnel directly involved and external individuals who participated in planning. Provide a timetable of events necessary for the implementation of the proposed program.**

As part of the USF 5-year new program planning, the IT program initiated the request to change the current M.Ed. concentration in Instructional Technology to create a new M.S. degree in Learning Design and Technology to better align with the current trends in the field, faculty members' expertise, and the unique opportunities present in the University of South Florida. The request was supported by the EPS department Chair, Barbara Shircliffe, as well as the Interim Dean Roger Brindley and Associate Dean Ann Cranston-Gingras and submitted to the university. Upon approval, the faculty members in the Instructional Technology Program submitted a pre-proposal with collaboration of Michael Berson and Hese Berson at the Department of Teaching and Learning, Amber Dumford at the Department of Leadership, Counseling, Adult, Career and Higher Education and Christine Brown and Christie Nicholas at USF Innovative Education. A revised pre-proposal was submitted and was approved to move forward to work plan. This proposal was then drafted by the IT faculty in consultation with the EPS and USF administration.

Planning Process

Date	Participants	Planning Activity
Feb. 2017	IT faculty (Lou, Fink, Smith, Park, & Hatten), Innovative Education (Christine Brown & Christie Nicholas), High Education faculty (Dumford), and Social Studies Education faculty (Berson & Berson), and EPS Dept. Chair Shircliffe.	Pre-proposal planning meeting
Feb and March 2017	IT faculty in collaboration with faculty in the department of Teaching and Learning, and Higher Education	Worked on pre-proposal
5/9/2017	IT faculty (Lou, Fink, Smith, Park, & Hatten), Innovative Education (Christine Brown & Christie Nicholas), High Education faculty (Dumford), and Social Studies Education faculty (Berson & Berson), and EPS Dept. Chair Shircliffe.	Full proposal planning meeting
July & August 2017	IT faculty in collaboration with faculty in the department of Teaching and Learning, and Higher	Worked on full proposal

Revised December 8, 2016

	Education with input from Graduate Studies Office and Office of Innovative education	
8/14/2017	EPS Dept. Chair Shircliffe, COE Associate Dean Ann Cranston-Gingras and IT Program Faculty and Coordinator Lou met with Cynthia Brown Hernandez, Ruth Bahr, Carol Hines-Cobb from Graduate Studies Office, and Cynthia DeLuca from the Innovative Education	Review 1 st proposal draft focusing on curriculum
9/1/2017	COE Associate Dean Ann Cranston-Gingras and IT Program Faculty and Coordinator Yiping Lou met with Cynthia Brown Hernandez, Ruth Bahr, Carol Hines-Cobb from Graduate Studies Office, and Cynthia DeLuca from the Innovative Education	Review full proposal draft focusing on curriculum
9/8/2017	EPS Dept. Chair Barbara Shircliffe and Cynthia Brown Hernandez from Graduate Studies Office	Review Appendix tables

Events Leading to Implementation

Date	Implementation Activity
3/6/2017	Pre-proposal reviewed and received revision recommendation at GC meeting
3/20/2017	Pre-proposal approved by GC
4/14/2017	Pre-proposal approved by CAVP
May 2017	Work Plan approved by BOT
June 2017	Work Plan approved by BOG
September 2017	College GPC review full proposal
October 2017	USF Graduate Council review full proposal
	APAC review full proposal
	BOT review full proposal
	BOG approve full proposal and add to the official "Degree Inventory"
August 2018	Implementation of the degree

VII. Program Quality Indicators - Reviews and Accreditation

Identify program reviews, accreditation visits, or internal reviews for any university degree programs related to the proposed program, especially any within the same academic unit. List all recommendations and summarize the institution's progress in implementing the recommendations.

There were two external reviews of the Instructional Technology Program, one in 2004 and one in 2015. The recommendations from the 2015 review were followed up on. For instance, the 2015 review commented that the "Instructional Technology program lacks an up-to-date web presence."

In August of 2017, we just unveiled our new up to the minute beautiful web page.

It was noted during the 2015 review that the number of faculty in the Instructional Technology program was small compared with the number of students. Because of that the question came up during the 2015 review: "Should the recruiting and management of online Master's programs be outsourced to the university online course design and development unit?" Since then we have outsourced marketing and some management of the online portion of the master's program to the Office of Innovative Education (InEd) within our university. InEd has worked with the Instructional Technology program faculty on "refreshing" their online courses. The refresh includes creating a similar design template for all our online courses, reorganizing and streamlining courses and also providing many new effective learning resources within each class (such as videos, etc.). Further, InEd has taken over marketing of the master's program, with the result that we have over 40 new master's students for Fall of 2017.

VIII. Curriculum

- A. Describe the specific expected student learning outcomes associated with the proposed program. If a bachelor's degree program, include a web link to the Academic Learning Compact or include the document itself as an appendix.

Required Program Core (21 hours):

EDF 6481	3	Foundations of Educational Research
EME 6055	3	Current Trends in Instructional Technology
EDF 6284	3	Problems in Instructional Design for Computers
EME 6457	3	Online Teaching and Learning
EME 6XXX	3	Digital Media and Learning
EME 6207	3	Web Programming and Design
EME 6XXX	3	Introduction to Big Data and Learning Analytics

Students either choose one of the concentrations below or complete 9 hours of electives chosen in consultation with the Graduate Director.

Concentrations (9 hours)

E-learning Design and Development

EME 6XXX	3	Motivational design for Learning Technology
EME 6235	3	Technology Project Management

Recommended electives (choose one):

EME 6208	3	Interactive Media
EME 6215	3	Instructional Graphics
EME 6209	3	Digital Video

Cybersecurity Education

EME 6480	3	Digital Citizenship and Online safety
EDG 6436	3	Cybersecurity in the Schools

Recommended electives (choose one):

RED 6449	3	Technology and Literacy
EME 6053	3	Internet in Education
EME 6936	3	Technology Leadership in Education

Big Data and Learning Analytics

EME 6XXX	3	Predictive Learning Analytics
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EME 6XXX	3	Data visualization
Recommended electives (choose one):		
EME 6XXX	3	Data in Assessment and Accreditation
EME 6614	3	Game Analytics for Learning

Game-Based Learning and Analytics

EME 6157	3	Game Design for Learning
EME 6614	3	Game Analytics for Learning
Recommended electives (choose one):		
EME 6215	3	Instructional Graphics
EME 6209	3	Digital Video
EME 6930	3	Web Programming

Electives 9 hours

Students who choose electives in lieu of a concentration select 9 hours of electives in consultation with the Graduate Director.

Capstone - (3 hours, choose one)

EME 6613	3	Development of Technology-based Instruction
EME 6936	3	Internship

B. Describe the admission standards and graduation requirements for the program.

Admission Requirements:

Must meet University requirements (see Graduate Admissions) as well as requirements for admission to the major, listed below.

- A bachelor's degree or its equivalent from a regionally-accredited institution.
- An undergraduate grade point average of 3.00 or higher (on a 4.00 scale) for a baccalaureate degree from a regionally-accredited institution.
- Two letters of recommendation.
- Resume or vita documenting their work and educational experiences to date.
- A one-page Goals Statement describing the applicant's motivation for entering the M.Ed. program, what s/he hopes to achieve upon completion of the program, and the number of courses s/he plans to take each semester while in the program.

Additional requirements may be imposed by the College of Education and the University Graduate Admissions office (for example, international students may be required to submit TOEFL exam scores, etc). Please be sure to review the admission information and requirements for BOTH the College of Education and the Graduate Admissions office.

Graduation Requirements:

During the final semester of the program, each Master's candidate is required to submit an electronic portfolio (*E-Portfolio*) that highlights his/her Instructional Design/Technology (IDT) abilities, skills, and performance they acquired from the program coursework. Through the collection of digital projects/products (aka. course artifacts), Master's candidates present not only a record of their studies but also their competencies in IDT to potential employers or institutions for doctoral studies. The *E-Portfolio* may be developed with any Website development services (USF Webspace or other free hosting services such as Google site, Weebly, Wix etc.) where reviewers can

Revised December 9, 2014

access without login credentials. The E-Portfolio takes the place of a comprehensive exam and must address five areas of national standards developed by the Association for Educational Communications & Technology (AECT) in 2012.

- C. Describe the curricular framework for the proposed program, including number of credit hours and composition of required core courses, restricted electives, unrestricted electives, thesis requirements, and dissertation requirements. Identify the total numbers of semester credit hours for the degree.

Required Program Core: 21 hours

Concentration:

Required: 6

Elective: 3

Students not choosing a concentration will take 9 hours of electives

Capstone: 3

Total number of hours: 33

- D. Provide a sequenced course of study for all majors, concentrations, or areas of emphasis within the proposed program.

The first two courses in any sequence are generally EME 6055: Current Trends and EME 6208: Interactive Media. EME 6208: Interactive Media should be completed before EDF 6284. EDF 6284 must be completed before EME 6613.

Sample Course Schedule for Taking Two Courses Each Semester

Year 1

Fall	Spring	Summer
EME 6055 Current Trends in Instructional Technology (3)	EME 6XXX Digital Media and Learning (3)	EDF 6481 Foundational of Educational Research (3)
Elective (3) OR Concentration course (3)	EME 6XXX Introduction to big data and learning analytics (3)	Elective (3) OR Concentration course (3)

Year 2

Fall	Spring	Summer
EDF 6284 Problems in Instructional Design for Computers (3)	EME 6207 Web Programming and Design (3)	EME 6457 Online Teaching and Learning (3)
Elective (3) OR Concentration course (3)	EME 6613 Development of Technology-Based Instruction (3) OR Internship	E-Portfolio

Students can also complete one or more graduate certificates at the same time they are completing their M.Ed. coursework. Many of the M.S. courses simultaneously can count towards one or more graduate certificates, without requiring any additional coursework on the student's part.

E. Provide a one- or two-sentence description of each required or elective course.

Required Courses:

EDF 6481 - Foundations of Educational Research (3 hours)

Basic knowledge on educational inquiry; tools and techniques used in educational research and evaluation; basic measurement concepts, role of measurement and research in education, construction of classroom assessments.

EME 6055 - Current Trends in Instructional Technology (3 hours)

Development of concepts, strategies, and materials for the use of computer technology in the enhancement of instruction. The course explores the impact that computer technology can have on the nature of the teaching/learning process.

EDF 6284 - Problems in Instructional Design for Computers (3 hours)

This course focuses on the systematic design of instructional courseware, including analysis, media selection and evaluation. Topics include instructional strategies, screen design, response analysis, feedback and interactivity.

EME 6457 - Online Teaching and Learning (3 hours)

This online course will explore all aspects of distance education. Topics include instructional strategies, interactivity, course development, research, delivery systems, needs analysis, administration, and evaluation.

EME 6XXX - Digital Media & Learning (3 hours)

In this course students will be introduced to the sociological and critical literatures on instructional technology, primarily via the Digital Media and Learning (DML) research network. Through these literatures, students will learn to develop open, connected, and student-centered instructional experiences using information technologies. This course extends the open, online course developed by the DML research network, entitled Connected Courses, to cover more conceptual material from technology studies, games/platform studies, and critical pedagogies.

EME 6XXX Introduction to big data and learning analytics (3 hours)

This course will explore the design and implementation of large databases used for educational planning, evaluation, and assessment. In addition, the course will investigate the analysis and reporting of data for the purposes of understanding and optimizing student learning.

EME 6207 - Web Programming and Design (3 hours)

This online course focuses on the design of instructional and informational web sites. Topics include writing for the web, design of visual elements, web programming, usability issues, interactivity, multimedia, accessibility, globalization, and marketing. Students will evaluate web sites, create web-based quizzes, and design Web-Based Training (WBT).

EME 6613 - Development of Technology-based Instruction (3 hours)

Application of computer-based instructional design principles to the development of technology-based instruction. This course also incorporates state-of-the-art materials and methods involving digital technologies. PR: EDF 6284.

Elective Courses:**EME 6XXX - Motivational Design for Learning Technology (3 hours)**

This course explores the design principles of learner motivation in technology-enhanced learning environments. Students will learn various motivational design concepts and ideas including interest, self-efficacy, motivational regulation, motivational design models, and motivation measures, among others. Students will also be engaged in the motivational design process by analyzing the learner, learning tasks, and learning environments.

EME 6208 - Interactive Media (3 hours)

This course focuses on the design, development and implementation of interactive media in instructional settings. Topics include: hypermedia programs, compact disc technologies, digital images, interactive videodiscs, digital audio and digital video. Students will evaluate commercial programs and develop custom applications using appropriate tools.

EME 6480 - Digital Citizenship & Online Safety (3 hours)

This course provides an overview of basic digital citizenship concepts and a critical view of online safety issues with a focus on youth and educational settings. Students will develop a contextualized understanding of online threats faced by youth, examining the different social, legal, and technological forces that produce problems with safety and security through the work of key Internet studies scholars.

EDG 6436 - Cybersecurity in the Schools (3 hours)

The course addresses the latest technology policies from a practitioner's perspective. As educators and educational leaders are increasingly implementing technologies into their classrooms, schools and districts, they need to engage in critical conversations analyzing security issues and exploring solutions that are safe but do not inhibit technology use. Cybersecurity in the Schools will allow the students to gain knowledge in developing and implementing technology policies that govern schools and districts. Based on research and best practices, the course experiences will provide the knowledge to understand opportunities and challenges associated with technology use and policies and equip aspiring and practicing leaders with the necessary tools to protect their schools while empowering children and youth to optimize the benefits of digital resources. Future school administrators must be able to effectively understand the policies governing the many growing technologies that are part of our rapidly changing society. This course is designed for candidates to become more effective leaders by becoming familiar with the emerging technologies for diverse applications. Additionally, this course enhances candidates' theoretical and practical knowledge of available instructional and administrative technologies to construct healthy digital environments in schools.

RED 6449 - Technology and Literacy (3 hours)

Literacy and Technology focuses on technology as a tool for literacy instruction. Throughout the course, students will preview and evaluate literacy-related software and websites, critique research related to literacy and technology, and design, develop and present software programs for literacy and learning instruction.

EME 6053 - Internet in Education (3 hours)

The course focuses on the applications of the Internet in education. Topics include: educational resources on the Internet, copyright issues, webpage construction, evaluation of websites, Web Quests and other techniques for using the Internet to enhance instruction.

EME 6936 - Technology Leadership in Education (3 hours)

The course explores the transformational power of emerging technologies to improve student

learning and how leaders can integrate educational technologies in their schools. Learned skills include school-wide planning that incorporates instructional design, curriculum integration with the standards, and logistics of technology implementation at the school and district level, technology for professional development and training, and technologies for evaluation purposes. Students will prepare plans for implementation of these projects for local site improvement.

EME 6XXX - Predictive Learning Analytics (3 hours)

This course will examine how educational professionals can leverage data to promote student success. Student will learn how data modeling can be used to effectively create early warning signals for identifying at-risk students and then create programs to support those students.

EME 6XXX - Data visualization (3 hours)

Students will learn how to communicate effectively using data. In addition, students will be able to create graphs, images, diagrams, and animations to convey messages to differing constituents in educational settings.

EME 6XXX - Data in Assessment and Accreditation (3 hours)

The primary purpose of the course is to explore the role of data in assessment and accreditation. Students will gain an understanding of how practitioners can engage in and use assessment to inform their work in an educational setting and how data collection and analysis can be critical to a successful accreditation process.

EME 6157 - Game Design & Development for Learning (3 hours)

Students learn about the structure of computer games, and the design and development of games for learning. Students work in interdisciplinary teams designing/developing a game for learning.

EME 6614 - Games Analytics for Learning (3 hours)

Students first learn theory & practice of game analytics, i.e., using games to gather data for assessment of learning. Students then fine-tune a game with iterative cycles of formative evaluation & revision, and finally gather a data set & analyze it.

EME 6209 - Digital Video (3 hours)

This course focuses on the design, development, and implementation of animation and digital video for instructional multimedia programs. Topics include file formats, compression options, editing techniques, design considerations, and appropriate software tools.

EME 6215 - Instructional Graphics (3 hours)

This course focuses on the creation, transfer, and manipulation of graphic files for multimedia applications, web design, and instructional design.

EME 6235 - Technology Project Management (3 hours)

This course focuses on the management of technology-based instructional projects. Topics include theories of project management, cost and time estimation, management software, role differentiation, resource planning, work breakdown structures, formative and summative evaluation, and dissemination. PR: EDF 6284

- F. For degree programs in the science and technology disciplines, discuss how industry-driven competencies were identified and incorporated into the curriculum and indicate whether any industry advisory council exists to provide input for curriculum development and student assessment.**

The Department of Educational and Psychological Studies (EPS) has established a program planning committee consisting of faculty members from multidisciplinary programs with expertise in learning technology design and development, game-based learning, big data and learning analytics, cyber security education, and the USF Innovative Education Digital Learning Director and Instructional Designer. At the committee meetings, members shared what competencies the graduates from the MS in Learning, Design, and Technology degree program should have in terms of professional skills. The committee reviewed the Association for Educational Communications and Technology (AECT) standards (http://cymcdn.com/sites/aect.site-ym.com/resource/resmgr/AECT_Documents/AECTstandards2012.pdf)/Association for Talent Development (ATD; formerly American Society for Training and Development (ASTD)) (<https://www.td.org/Certification/Competency-Model>) / 2017 National Education Technology Plan published by the U.S. Department of Education (<https://tech.ed.gov/files/2017/01/NETP17.pdf>), and documents published by the Department of Homeland Security for the Cybersecurity curriculum. Committee members regularly attend and present at professional meetings, national/international conferences, and workshops to maintain current knowledge/skills of the latest trends in learning design and technologies.

- G. For all programs, list the specialized accreditation agencies and learned societies that would be concerned with the proposed program. Will the university seek accreditation for the program if it is available? If not, why? Provide a brief timeline for seeking accreditation, if appropriate.**

The university will not seek accreditation for the proposed program. Since the program is multidisciplinary and addressing emerging fields of specialization, there is no accreditation agency that provides accreditation for the proposed concentrations.

- H. For doctoral programs, list the accreditation agencies and learned societies that would be concerned with corresponding bachelor's or master's programs associated with the proposed program. Are the programs accredited? If not, why?**

N/A

- I. Briefly describe the anticipated delivery system for the proposed program (e.g., traditional delivery on main campus; traditional delivery at branch campuses or centers; or nontraditional delivery such as distance or distributed learning, self-paced instruction, or external degree programs). If the proposed delivery system will require specialized services or greater than normal financial support, include projected costs in Table 2 in Appendix A. Provide a narrative describing the feasibility of delivering the proposed program through collaboration with other universities, both public and private. Cite specific queries made of other institutions with respect to shared courses, distance/distributed learning technologies, and joint-use facilities for research or internships.**

The program will be delivered both on campus and online via USF Course Management System, Canvas. Students can complete the program totally online or with a combination of online and on campus courses.

IX. Faculty Participation

- A. Use Table 4 in Appendix A to identify existing and anticipated full-time (not visiting or adjunct) faculty who will participate in the proposed program through Year 5. Include (a) faculty code associated with the source of funding for the position; (b) name; (c) highest degree held; (d) academic discipline or specialization; (e) contract status (tenure, tenure-earning, or multi-year annual [MYA]); (f) contract length in months; and (g) percent of annual effort that will be directed toward the proposed program (instruction, advising, supervising internships and practica, and supervising thesis or dissertation hours).**

Five core faculty members (Lou, Smith, Park, Fisk & Hatten) and four affiliated faculty members (M. Berson, I. Berson, Dumford & Cain) will teach courses and guide students in the proposed M.S. degree in Learning Design and Technology. All are in the faculty code A. All hold Ph.D. degrees. Specializations include: Educational Technology; Education, Media and Computers; Instructional Systems; Science and Tech Studies; Learning Technologies; Higher Education; Educational Foundations & Inquiry. All except for one affiliated faculty member are on 9-month contracts. Two are tenured full professors, three are tenured associate professors, two are tenure-earning assistant professors, and two are NTE instructors.

Two of the core faculty members will serve as co-directors of the program, sharing administrative duties involved in the program. All five core faculty members will participate in advising the students, supervising internships, and evaluating students' final e-portfolio. Three core faculty members will teach two courses each semester. One faculty member will teach one course in the Fall semester and two courses in the Spring semester. And one core faculty member will teach one course in Year 1 and two courses in Year 5. The four affiliated faculty members will each teach one course in Year 1. Three of the affiliated faculty members will teach one course in Year 5 and one will teach two courses in Year 5.

- B. Use Table 2 in Appendix A to display the costs and associated funding resources for existing and anticipated full-time faculty (as identified in Table 4 in Appendix A). Costs for visiting and adjunct faculty should be included in the category of Other Personnel Services (OPS). Provide a narrative summarizing projected costs and funding sources.**

As presented in Table 2 in Appendix A, the program will be supported through reallocation of E&G base for faculty effort. The proposed program will be funded via the existing budget of the Department of Educational and Psychological Studies for the five core faculty members and one affiliated faculty member. Two affiliated faculty members will be funded via the existing budget of the Department of Teaching and Learning. One affiliated faculty members will be funded via the existing budget of the Department of Leadership, Counseling, Adult, Career and Higher Education.

- C. Provide in the appendices the abbreviated curriculum vitae (CV) for each existing faculty member (do not include information for visiting or adjunct faculty).**

Abbreviated CV for each existing faculty member is attached in the Appendix B.

- D. Provide evidence that the academic unit(s) associated with this new degree have been productive in teaching, research, and service. Such evidence may include trends over time for average course load, FTE productivity, student HC in major or service courses, degrees granted, external funding attracted, as well as**

qualitative indicators of excellence.

The academic unit directly associated with the proposed new degree is the Instructional Technology (IT) unit in the Department of Educational and Psychological Studies. The unit has 5 core faculty members. Of these, one tenure-earning assistant professor and one instructor joined in Fall 2015.

The IT faculty members have all been highly productive in the areas of teaching, research and service as demonstrated various measures of productivity (e.g., FTE, student head count, degrees granted, external funding attracted, number of publications and presentations, and national research and presentation awards).

Teaching

With redesign of all core courses in the M.Ed. concentration in the last two years, new program web site, and increased recruitment efforts, we have seen a sharp increase in the number of applicants, admissions, and course enrollments. Student head count has a 33% increase from Fall 2016 to Fall 2017. IT course enrollment had a 77% increase from Fall 2016 to Fall 2017. An increasing number of IT students presented at national and international professional conferences. One team of IT students were one of the three finalists for Instructional Design and Development Competition at the AECT international conference. In 2017, two USF teams participated and both are selected as the finalists and will be presenting at the AECT conference this year. This is the first time that two finalists were selected from the same university. The recognition speaks to the outstanding quality of the students' training in the program.

Research

The IT faculty members are productive scholars and innovative researchers. In the last four years, IT faculty were awarded three National Science Foundation grants, two federal department of education grants, and one Institute of Educational Sciences grant as PIs and Co-PIs:

- National Science Foundation (NSF)-Climate Change Narrative Game Education (PI & Co-PI, \$500,000)
- NSF - Water Awareness Research and Education (Co-PI, \$499,972)
- Institute of Educational Sciences - Professional Development of an MTSS Model for Early Childhood Educators to Prevent Reading Disabilities (Co-PI, \$1,400,000)
- US Department of Education - K-12 Math and Science Partnership (PI, \$770,066)
- NSF/NSA GenCyber (PI, \$100,000)
- NSF - SoTC: CORE: Small: A Privacy-Preserving Meta-Data Analysis Framework for Cyber Abuse Research-Foundations, Tools and Algorithms (Co-PI, \$498,333).

The external grants awarded in the last four years total over \$3,770,000.

The IT faculty members' research are published in *Journal of Educational Computing Research*, *Computers & Education*, *Educational Technology Research & Development*, *Journal of Research in Reading*, *Educational Technology & Society*, *Review of Educational Research*, *The Internet and Higher Education*, *Applied Cognitive Psychology*, *Journal of Distance Education*, *Journal of Geoscience Education*, *American Journal of Distance Education*, *Computers in the Schools*, *International Journal of Designs for Learning*, *Journal of Service-Learning in Higher Education*, *The International Review of Research in Open and Distributed Learning*, *Journal of Educational Technology & Society*, *Journal of Interactive Learning Research*, *Applied Cognitive Psychology*, *Journal of Educational Multimedia and Hypermedia*.

Two IT faculty members were awarded outstanding research awards prestigious national and international education conferences. One faculty member received Fulbright Cybersecurity Scholar award for work at LSE on Parenting for a Digital Future project in UK.

Service

The IT faculty members make valuable contributions to the university and the professional community of instructional and learning technology through leadership and active service. All faculty served on a variety of University and College Committees including: Distinguish University Professor selection committee, Outstanding thesis and dissertation award selection committee, Graduate Policy Council, Undergraduate Policy Council, a statewide evaluation team of three learning management systems, and College Technology Advisory Committee.

State and community services IT faculty served on include: Cybersecurity Community Outreach Liaison, Florida Center for Instructional Technology, Workshops on Technology Integration in Science Education for middle and high school science teachers in four school districts, and Watergrass Elementary School Advisory Committee.

Services on national and international services include: chair of Sig Computer and Internet Applications in Education at AERA, Treasurer of Sig Computer and Internet Applications in Education at AERA, National Initiative of Cybersecurity Education - Cybersecurity training and certifications Working Group, EDUCAUSE - Training & Awareness Working Group: Cybersecurity Awareness/Phishing, *Journal of Computing in Higher Education* Editorial Board, *Educational Technology Research and Development* Consulting Editor, and Editorial Review Board on a number of journals.

X. Non-Faculty Resources

- A. Describe library resources currently available to implement and/or sustain the proposed program through Year 5. Provide the total number of volumes and serials available in this discipline and related fields. List major journals that are available to the university's students. Include a signed statement from the Library Director that this subsection and subsection B have been reviewed and approved.

The complete library report is included at the end of this document.

- B. Describe additional library resources that are needed to implement and/or sustain the program through Year 5. Include projected costs of additional library resources in Table 2 in Appendix A. Please include the signature of the Library Director in Appendix B.

The complete library report is included at the end of this document.

- C. Describe classroom, teaching laboratory, research laboratory, office, and other types of space that are necessary and currently available to implement the proposed program through Year 5.

Classrooms, conference rooms, and two computer labs are available for the program use in the College of Education building. Additionally, the program is supported by the iTeach Lounge, a student technology support and resource center staffed by graduate students and outfitted with current hardware, software, and equipment.

- D. Describe additional classroom, teaching laboratory, research laboratory, office, and other space needed to implement and/or maintain the proposed program through Year 5. Include any projected Instruction and Research (I&R) costs of additional space in Table 2 in Appendix A. Do not include costs for new

construction because that information should be provided in response to X (E) below.

No additional classroom, teaching laboratory, research labs, office, or other spaces are needed to implement or maintain the proposed program. A large number of students are expected to be online students. For both on campus and online students, the university course management system will be used for course delivery.

- E. If a new capital expenditure for instructional or research space is required, indicate where this item appears on the university's fixed capital outlay priority list. Table 2 in Appendix A includes only Instruction and Research (I&R) costs. If non-I&R costs, such as indirect costs affecting libraries and student services, are expected to increase as a result of the program, describe and estimate those expenses in narrative form below. It is expected that high enrollment programs in particular would necessitate increased costs in non-I&R activities.**

The College of Education has two computer labs that can be used for the proposed program. Some multimedia development software are available on these computers. In addition, the university provides a cloud-based suite of software for student use. The USF Library also has a computer lab that can be used for the program.

- F. Describe specialized equipment that is currently available to implement the proposed program through Year 5. Focus primarily on instructional and research requirements.**

Two computer labs in the College of Education are available to implement the program through Year 5. The USF online course management system, Canvas, will be available for course delivery to online students as well as on campus students.

- G. Describe additional specialized equipment that will be needed to implement and/or sustain the proposed program through Year 5. Include projected costs of additional equipment in Table 2 in Appendix A.**

We do not anticipate that any additional specialized equipment that will be needed to implement the program.

- H. Describe any additional special categories of resources needed to implement the program through Year 5 (access to proprietary research facilities, specialized services, extended travel, etc.). Include projected costs of special resources in Table 2 in Appendix A.**

N/A

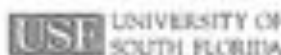
- I. Describe fellowships, scholarships, and graduate assistantships to be allocated to the proposed program through Year 5. Include the projected costs in Table 2 in Appendix A.**

N/A

- J. Describe currently available sites for internship and practicum experiences, if appropriate to the program. Describe plans to seek additional sites in Years 1 through 5.**

Revised December 6, 2011

USF Innovative Education currently offers internship opportunities for our M.Ed. students and will continue to do so for the students in the proposed M.S. program. Additional opportunities at USF include the Instructional Design unit at School of Nursing, USF Morsani College of Medicine, Florida Center for Instructional Technology (FCIT), and Florida Cybersecurity Center (FC²). External internship opportunities will be explored with e-learning companies such as BISK.



**Collection Analysis for New Degree Program
Master of Science in Learning Design and Technology**

X. Non-Faculty Resources

- A. Describe library resources currently available to implement and/or sustain the proposed program through Year 5. Provide the total number of volumes and serials available in this discipline and related fields. List major journals that are available to the university's students. Include a signed statement from the Library Director that this subsection and subsection B have been reviewed and approved.

Overview of USF Libraries, Mission, and Program/Discipline Strengths

The University of South Florida is accredited by the Commission on Colleges of the Southern Association of Colleges and Schools to award degrees at the baccalaureate, masters, specialist, and doctoral levels, including the Doctor of Medicine. The institution was initially accredited in 1965 and was last reviewed and reaffirmed in 2015.

The University of South Florida's Libraries consist of USF's main research library, located on the Tampa Campus; two special libraries, the Hinks and Elaine Shimberg Health Sciences Library and the Louis de la Parte Mental Health Institute Research Library, which are also located on the Tampa Campus; the Nelson Poynter Memorial Library, USF St. Petersburg campus; and the Jane Bancroft Cook Library, which is a joint-use facility shared with New College of Florida and USF Sarasota-Manatee campus

The USF Libraries strive to develop and maintain collections that meet the teaching, learning, and research for the faculty and students at the University of South Florida. Together, the USF Libraries provide access to more than 2 million volumes. The physical collection includes print materials, microform, archival materials, special collections, government publications, and maps. The electronic resources collection includes approximately 12,500 e-journal subscriptions, 927 aggregator databases, containing an additional 52,500 unique e-journal titles, and over 672,000 e-books. The USF Libraries provide access to over 23,500 unique digital images and students also have access to over 80,000 audiovisual materials including streaming videos, CDs, and DVDs.

USF Libraries Collections

The USF Libraries collections support the teaching needs of the undergraduate and graduate curriculum and provide more advanced research materials that meet the specialized research demands of the graduate students and faculty.

A review of resources needed for a new master's degree program in Learning Design and Technology, shows that the USF Tampa Library does already have a broad range of interdisciplinary research materials within Library of Congress subject classifications that pertain to the study of learning design and technology. Specialized areas of study that provide direct support for a master's degree in Learning Design and Technology include, but are not limited to, resources in the LC call number areas of L, LB, QA, TK:

General Education	L1 - L999
Theory & Practice of Education	LB1 - 1139.1
Computer-Assisted Instruction	LB1028.43 - LB1028.75

Educational Research	LB1026-1028.2
Games, Simulations, and Toys	LB1029.8 - LB1029.T6
Audiovisual Education and Materials	LB1042.5 - LB1044.86
Cybersecurity	QA76.9
Computer Technology (Learning)	QA76.77
Game Theory	QA269-QA272
Computer Networks (Web Design)	TK5105.1 - TK5105.88

The USF Libraries place a strong emphasis on the acquisition and maintenance of a robust collection of electronic journals and in the development of a strong research monographic eBook collection representing the important trade, university and professional presses. Other resources, such as conference proceedings, technical reports, dissertations, reference works, datasets, audio-visual materials, and graduate and advanced undergraduate texts are acquired selectively, when necessary.

Number of Print & Electronic Books in Education & Computer Science – 60,404

Number of Print Books & Ebooks in subject areas of Learning Design and Technology – 3,206

Ebook Collections that have a wide range of ebooks pertaining to Learning Design and Technology include:

Cambridge Books Online, EBSCO Ebook Collection, Oxford Scholarship Online, Project Muse, ProQuest Ebook Central, Science Direct, SpringerLink, Taylor & Francis Ebooks, and Wiley Online Library.

Number of Journals & Ejournal in Education & Computer Science – 4,142

Searching by the simple key phrase of "learning design and technology" in the USF Libraries Discovery Tool, FindIt!, provided access to over 12,000 full-text articles in academic journals that were available through the USF Libraries ejournal subscriptions.

Selected List of journals/ejournals in the subject areas of Learning Design and Technology:

British Journal of Educational Technology
Computer Assisted Language Learning
Computers & Education
Educational Technology & Society
IEEE Transactions on Learning Technologies
Information Technologies and Learning Tools
Innovative Journal of Curriculum and Educational Technology
Internet and Higher Education
International Journal of Computer-Supported Collaborative Learning
International Journal of Distance Education Technologies
International Journal of Educational Research and Technology
International Review of Research in Open and Distributed Learning
Journal of Computer and Education Research
Journal of Computer Assisted Learning
Journal of Computing in Higher Education
Journal of Educational Computing Research
Journal of Experimental Education
Journal of Information Technology Education

Journal of Literacy and Technology
Journal of Science Education and Technology
Journal of Technology Education
Learning and Instruction
Learning Media and Technology
Review of Educational Research
Technology Pedagogy and Education

Ejournal Collections that include ejournals that are relevant for the Learning Design and Technology subject areas:

Cambridge Journals Online, Directory of Open Access Journals, Elsevier Science Direct, EBSCOhost Electronic Journals Collection, Highwire Press, IEEE Explore, Oxford Journals, Project Muse, Springerlink, Taylor & Francis Online, and Wiley Online Library.

Number of Electronic Databases - over 60 databases

Includes specialized databases in Education, Computer Science, and General & Multi-disciplinary subject areas.

Select List of Databases that are relevant for Learning Design and Technology

Subject Areas:

Academic Search Premier
Applied Science and Technology
Compendex
Education Source
ERIC
IEEE Explore
Inspec
National Technical Information Service (NTIS)
ProQuest Computer Science Collection
ProQuest Social Science Premium
Scopus
Social Science Database
Web of Science

Electronic Media Resources in Education – 701

In addition to videos, DVDs, and streaming videos, owned by the USF Libraries, all students also have access to over 26,000 films through Kanopy, a streaming video subscription service for academic institutions. These service allows for embedded links to be embedded into instructional design materials.

Government Publications

The USF Tampa Library is a designated Federal Depository Library. The materials that are received from the Government Publishing Office are selected based on the research needs of the university. The library routinely receives access to research reports from the U.S. Department of Education that are indexed by the Educational Resources Information Clearinghouse (ERIC) online database. Also available are resources from the Office of Educational Technology, the National Technical Information Service, and the Department of Homeland Security/Cybersecurity. Also available are congressional hearings and current regulations pertaining to educational learning design, technology, and cybersecurity.

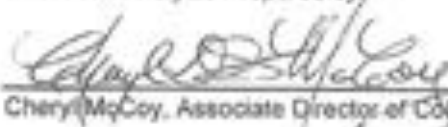
- B. Describe additional library resources that are needed to implement and/or sustain the program through Year 5. Include projected costs of additional library resources in Table 3 in Appendix A.

Summary Statement

Recognizing the value and importance of research, the USF Libraries will continue a sustained level of support that will meet the needs of graduate students who are pursuing a master's degree in Learning Design and Technology. A relatively new area of study for education and instructional design would be in the area of game development, as it pertains to education. It is possible that new resources would be needed to be purchased in order to provide an adequate level of support in this area. This could be an area that may require additional funding. A reliance on recent research in the journal literature may be sufficient to cover any gaps in overall support for this degree program.

In any given year, the USF Libraries materials budget is pushed to its limit. The rising cost of continuing journal/ejournal subscriptions, the need for new research materials, and requests for access to online databases and data sets are part of the daily landscape. A large portion of the USF Libraries' 6.2 million dollar budget supports the continuation of the electronic resources. Within the next five years, the expectation would be for a continued level of support for this discipline. An increase in the cost of the library's journal subscriptions would be anticipated, with typical annual increases of 3-6%. The acquisition of additional resources would have to be balanced against the research needs of other academic disciplines on campus within the confines of any budgetary restraints that the university could face during the next five years.

Collection Analysis Prepared by:

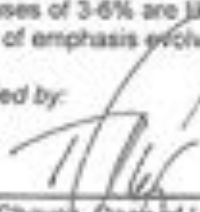


Cheryl McCoy, Associate Director of Collections, USF Libraries

Date: 8/30/2017 Email: cmccoy@usf.edu

As of August 2017, the collections of the USF Tampa Library and affiliates are sufficient to support a Master of Science degree in Learning Design and Technology. Sustained annual investments to maintain the recurring elements of this collection and to purchase newly published materials are required to preserve sufficiency. With escalating costs, typical annual increases of 3-6% are likely. Strategic investments are required as new faculty are hired and areas of emphasis evolve.

Certified by:



Todd Chavez, Dean of USF Libraries

Date: 8/31/17 Email: tchavez@usf.edu

Revised November 6, 2012

APPENDIX B

Please include the signature of the Equal Opportunity Officer and the Library Director.


Signature of Equal Opportunity Officer

10-16-17
Date

Please see prior page for signature
Signature of Library Director

Date

This appendix was created to facilitate the collection of signatures in support of the proposal. Signatures in this section illustrate that the Equal Opportunity Officer has reviewed section III.E of the proposal and the Library Director has reviewed sections X.A and X.B.

APPENDIX A
TABLE 3.8
PROJECTED HEADCOUNT FROM POTENTIAL SOURCES
(Graduate Degree Program)

Source of Students	Year 1		Year 2		Year 3		Year 4		Year 5	
	HEC	FTE	HEC	FTE	HEC	FTE	HEC	FTE	HEC	FTE
Not duplicated headcount in any given year*	07	03	03	08	10	07.3	09	03	08	03.3
Individuals drawn from agencies/institutions to provide care (e.g., child-rearing students)	00	00	00	00	00	00	00	00	00	00
Students who transfer from other graduate programs within the university**	00	00	00	00	00	00	00	00	00	00
Individuals who have recently graduated from preceding degree programs at this university	00	00	00	00	00	00	00	00	00	00
Individuals who graduated from preceding degree programs at other Florida public institutions	00	00	00	00	00	00	00	00	00	00
Individuals who graduated from preceding degree programs at non-public Florida institutions	00	00	00	00	00	00	00	00	00	00
Additional in-state residents***	00	00	00	00	00	00	00	00	00	00
Additional out-of-state residents***	00	00	00	00	00	00	00	00	00	00
Additional foreign residents***	00	00	00	00	00	00	00	00	00	00
Other Disposal***	00	00	00	00	00	00	00	00	00	00
Totals	07	03	03	08.3	10	7.3	09	03	08	3.3

* List proposed annual headcount of students enrolled in the degree program. List proposed yearly cumulative ENROLLMENT (FTE) instead of admissions.
 ** If students appear in this category, they should be listed in later years.
 *** Do not include individuals counted in any FTECH category in a given COOL/line.

APPENDIX A

TABLE 4
ANTICIPATED FACULTY PARTICIPATION

Faculty Code	Faculty Member "New Hire" - Highest Degree Held - Academic Discipline or Specialties	Rank	Classroom Status	Initial Date for Participation in Program	Min. Contract Year 1	FTE Year 1	% Offload Avg. Year 1	FTE Year 1	Min. Contract Year 2	FTE Year 2	% Offload for Prg. Year 2	FTE Year 2
A	Spring Care Ph.D. Educational Technology	Assoc. Prof.	Teaching	Spring 2019	9	0.75	0.21	0.21	9	0.75	0.21	0.21
A	Steve Smith Ph.D. Sales, Media & Communications	Assoc. Prof.	Teaching	Fall 2018	9	0.75	1.00	0.75	9	0.75	1.00	0.75
A	Stephanie Park Ph.D. International Business	Assoc. Prof.	Teaching	Fall 2018	9	0.75	1.00	0.25	9	0.75	1.00	0.75
A	Madison Fink Ph.D. Science and Tech Studies	Asst. Prof.	Teaching	Fall 2018	9	0.75	0.71	0.26	9	0.75	0.75	0.26
A	James Packer Ph.D. Learning Technologies	Associate	NTI	Fall 2018	9	0.75	1.00	0.25	9	0.75	1.00	0.25
A	Michael Roman Ph.D. Global Business	Postmaster	Teaching	Fall 2018	9	0.75	0.10	0.24	9	0.75	0.25	0.24
A	James Johnson Ph.D. Business	Postmaster	Teaching	Fall 2018	9	0.75	0.10	0.19	9	0.74	0.20	0.19
B	Andrew Davidson Ph.D. Higher Education	Assoc. Prof.	Teaching	Summer 2019	9	0.75	0.20	0.19	9	0.75	0.20	0.20
A	Lisa Cain Ph.D. Educ. Trends & Strategy	Postmaster	NTI	Spring 2019	11	1.00	0.28	0.28	11	1.00	0.28	0.28
	Total Position Starts (FTE)							3.34				

Faculty Code	Source of Funding	FTE Percentages by Budget Classification		
		Year 1	Year 2	Year 3
A	Student Education & General Revenue		1.00	
B	Student Education & General Revenue		0.00	
C	Student Education & General Revenue		0.00	
D	Student Education & General Revenue		0.00	
E	Student Education & General Revenue		0.00	
	Overall Totals for	Year 1	Year 2	Year 3
			3.34	3.34

Workforce Table 4 Faculty

SACS ASSESSMENT PLAN 2018-2019	
Degree: Master of Science in Learning Design and Technology (CIP Code: 13.0501)	
Brief Description of degree program: M.S. in LD&T includes curriculum in four concentrations that align with the emerging trends and growing needs: E-Learning Design and Development, Cybersecurity Education, Big Data Learning Analytics, and Game-Based Learning and Analytics. Students will gain theoretical knowledge of cognitive learning, motivational design, and develop skills in using emerging technologies in designing, developing and analyzing a variety of elearning outcomes.	
Learning Objective: Students will demonstrate in-depth knowledge, skills, and dispositions in applying cognitive and motivation theories in the use of emerging technologies in designing, developing, and analyzing a variety of elearning environments.	
Method of Assessment	<p>E-Portfolio E-portfolios provide a rich resource to gather data related to important student learning outcomes during the program, to help understand how different parts of the curriculum are connected to meet the overall program standards, and to drive programmatic improvement. During the final semester of the program, each Master's candidate is required to submit an electronic portfolio (<i>E-Portfolio</i>) that highlights his/her Learning Design and Technology abilities, skills, and performance they acquired from the program coursework. The <i>E-Portfolio</i> may be developed with any Website development services (LSP Webspace or other free hosting services such as google site, Weebly, Wix etc.) where reviewers can access without login credentials. The following sections are required in the E-Portfolio:</p> <ol style="list-style-type: none"> (1) Autobiographical narrative (approximately 500 words in length) (2) Key artifacts and the description of each for the AECT (2012) standards (3) YouTube video presentation showcasing the E-Portfolio (using a Screencasting tool) (4) Program of study form (revised and signed program of study form) <p>Submitted E-Portfolios are evaluated by the program faculty using a rubric based on AECT (2012) Competencies and Skills for Instructional Designers. A grade of "pass," "resubmit," or "fail" is assigned to the overall portfolio.</p> <ul style="list-style-type: none"> - Pass: The E-Portfolio adequately meets all of the requirements. - Resubmit: Some areas of the E-Portfolio need to be revised and resubmitted. - Fail: The E-Portfolio is unacceptable and fails to meet the requirements set forth.
Expectation	All students must demonstrate competence by meeting all of the requirements (2 or higher on a 3-point scale).
Results	
Use of Results for Improvement	

CURRICULUM VITAE

Amber D. Dumford
(formerly Amber D. Lambert)

Education

B.A., Indiana University - Bloomington
(Mathematics with minor in Political Science), May 2000
M.P.A., Indiana University - Bloomington
(Public Financial Administration and Public Management), May 2002
Ph.D., The Pennsylvania State University
(Higher Education with cognate in Sociology), May 2008

Professional Experience in Higher Education

Associate Professor, August 2016 to present

School of Education
University of South Florida, Tampa, FL

Taught doctoral students in Higher Education and masters students in College Student Affairs; Developed new courses and course materials; Advised students on their academic programs; Served on doctoral dissertation committees.

Associate Research Scientist, June 2008 to Aug 2016 (promoted from Assistant 2015)

Center for Postsecondary Research
Indiana University, Bloomington, IN

Involved in the development, administration, collection, and analysis of the National Survey for Student Engagement (NSSE) and other related projects; Analyzed multi-year data from over two million students at over a thousand institutions of higher education; Created experimental items and participated in the development of survey instrument

Honors and Awards

Association for Institutional Research Charles F. Elton Best Paper Winner, May 2015
AERA Division D Early Career Mentoring Invited Luncheon, April 2011
Institutional Research Initiative Award, October 2009

Peer-Reviewed Publications

- Cole, E. R., Dumford, A.D., & Nelson Laird, T. F. (in press). Senior leaders and teaching environments: Faculty perceptions of administrators' support of innovation. *Innovative Higher Education*, vol and pp TBD.
- Miller, A.L., Rocconi, L. M., & Dumford, A.D. (2017). Focus on the finish line: Does high-impact practice participation influence career plans and early job attainment? *Higher Education*, vol and pp TBD. DOI 10.1007/s10734-017-0151-z.
- Miller, A.L., Dumford, A.D., & Johnson, W.R. (2017). Music alumni play a different tune: Reflections on acquired skills and career outcomes. *International Journal of Education & the Arts*, 18(29).

- Ribera, A.K., Miller, A.L., & Dumford, A.D. (2017). Sense of peer belonging and institutional acceptance in the first year: The role of high-impact practices. *Journal of College Student Development, 58*(4), 545-563.
- Dumford, A.D., & Miller, A.L. (2017). Assessing alumni success: Income is NOT the only outcome! *Assessment & Evaluation in Higher Education, 42*(2), 195-207. doi: 10.1080/02602938.2015.1098587.
- Dumford, A.D., Cogswell, C.A., & Miller, A.L. (2016). The who, what, and where of learning strategies. *Journal of Effective Teaching, 16*(1), 72-88.
- Miller, A.L., & Dumford, A.D. (2016). Creative cognitive processes in higher education. *Journal of Creative Behavior, 50*(4), 282-297. doi: 10.1002/jocb.77.
- Dumford, A.D., & Miller, A.L. (2015). Are those rose-colored glasses you are wearing?: Student and alumni survey responses. *Research and Practice in Assessment, 10*, 5-14.
- Shaw, M. D., Dumford, A. D., Cole, E. R., Nelson Laird, T. F., & Haywood, A. M. (2015). Using faculty preference to identify disciplinary pairs and foster collaboration. *Journal on Excellence in College Teaching, 26*(3), 93-120.
- Lambert, A.D., & Miller, A.L. (2015). Living with smartphones: Does completion device affect survey responses? *Research in Higher Education, 56*(2), 166-177. doi: 10.1007/s11162-014-9354-7
*Association for Institutional Research Charles F. Elton Best Paper Winner
- Miller, A.L., & Dumford, A.D. (2015). The influence of institutional experiences on the development of creative thinking in arts alumni. *Studies in Art Education, 56*(2), 168-182.
- Dumford, A.D., & Rocconi, L. M. (2015). Development of the quantitative reasoning items on the National Survey of Student Engagement. *Numeracy, 8*(1), Article 8. DOI: <http://dx.doi.org/10.5038/1936-4660.8.1.5>.
- Miller, A.L., & Dumford, A.D. (2014). Open-ended survey questions: Item nonresponse nightmare or qualitative data dream? *Survey Practice, 7*(5), 1-11.
- Lambert, A.D., & Miller, A.L. (2014). Lower response rates on alumni surveys might not mean lower response representativeness. *Educational Research Quarterly, 37*(3), 38-51.
- Rocconi, L. M., Lambert, A.D., McCoemick, A. C., & Saeraf, S. A. (2013). Making college count: An examination of quantitative reasoning activities in higher education. *Numeracy, 6*(2), Article 10. DOI: <http://dx.doi.org/10.5038/1936-4660.6.2.10>
- Miller, A., & Lambert, A. (2012). Comparing skills and competencies for high school, undergraduate, and graduate arts alumni. *International Journal of Education & the Arts, 13*(5), 1-13. (<http://www.ijea.org/v13n5/>)
- Miller, A.L., Lambert, A.D., & Speirs Neumeister, K.L. (2012). Parenting style, perfectionism, and creativity in high ability and high achieving young adults. *Journal for the Education of the Gifted, 35*(4), 344-365.
- Chen, P. D., Lambert, A. D., & Guidry, K. R. (2010). Engaging online learners: The impact of web-based learning technology on student engagement. *Computers & Education, 54*, 1222-1232.

- Museus, S. D., Nichols, A. H., & Lambert, A. D. (2008). Effects of climate on second-year persistence decisions: An examination of racial/ethnic differences using structural equation modeling. *The Review of Higher Education*, 32(1), 107-134
- Lambert, A. D., Terenzini, P. T., & Lattuca, L. R. (2007). More than meets the eye: Curricular and programmatic effects on student learning. *Research in Higher Education*, 48(2), 141-168.

Articles under Review

- Dumford, A.D., & Miller, A.L. (n.d.). Online learning in higher education: Exploring advantages and disadvantages for engagement. Manuscript under review at *Journal of Computing in Higher Education*. (Submitted 7/24/2017)
- Miller, A.L., & Dumford, A.D. (n.d.). Do high achieving students benefit from honors college participation? A look at student engagement for first-year students and seniors. Manuscript under review at *Journal for the Education of the Gifted*. (Revise and resubmit 7/20/2017)
- Zilvinskis, J. & Dumford, A.D. (n.d.). The relationship between transfer student status, student engagement, and high-impact practice participation. Manuscript under review at *Community College Review*. (Resubmitted 6/6/2017)

Non Peer-Reviewed Publications

(additionally more than 20 technical reports starting in 2005 not listed)

- Miller, A.L., Sarraf, S.A., Dumford, A.D., & Rocconi, L.M. (2016). *Construct validity of NSSE Engagement Indicators* (NSSE Psychometric Portfolio Report). Bloomington, IN: Center for Postsecondary Research, Indiana University, School of Education. Available online: http://nsse.indiana.edu/pdf/psychometric_portfolio/Validity_ConstructValidity_FactorAnalysis_2013.pdf
- Miller, A.L., Dumford, A.D., Gaskill, S., Houghton, R., & Tepper, S.J. (2016). *To be or not to be (an arts major): Career aspirations and perceived skills of graduating seniors across multiple disciplines* (SNAAP Special Report for the National Endowment for the Arts). Bloomington, IN: Center for Postsecondary Research, Indiana University, School of Education. Available online: <https://www.arts.gov/sites/default/files/Research-Art-Works-Indiana.pdf>
- Dumford, A. D., & Miller, A. L. (2015). The educational and career experiences of arts graduates. Available online: <https://www.airweb.org/AIR/VisualDisplayOfData/Pages/Educational-Career-Experiences-Arts-Graduates.aspx>
- Frenette, A., Dumford, A.D., Miller, A.L., & Tepper, S.J. (2015). *The internship divide: The promise and challenges of internships in the arts* (SNAAP Special Report). Bloomington, IN: Indiana University and Arizona State University, Strategic National Arts Alumni Project.
- Lambert, A. D. (2013). Response to promoting student engagement by engaging staff: Implementing a survey of student engagement. In C. O'Farrell & A. Farrell (Eds.), *Emerging issues in higher education III: From capacity building to sustainability*. Athlone: EDIN.

Chen, P. D., Gonyea, R. M., Sarraf, S. A., BrekaLorenz, A., Korlmoz, A., Lambert, A. D., Shoup, R., & Williams, J. M. (2009). Analyzing and interpreting NSSE data. *New Directions for Institutional Research*, 141, 35-54.

Professional Conference Papers and Presentations
(last two years, but additionally have over 80 starting in 2005 not listed)

- Miller, A.L., & Dumford, A.D. (2017, April). *Social desirability bias and faculty respondents: Is "good behavior" harming survey results?* Paper presented at the Annual Meeting of the American Educational Research Association, San Antonio, Texas.
- Miller, A.L., Ribera, A.K., & Dumford, A.D. (2017, April). *If the engagement fits: Effective educational practices that relate to college students' sense of belonging.* Paper presented at the Annual Meeting of the American Educational Research Association, San Antonio, Texas.
- Dumford, A.D., & Miller, A.L. (2016, November). *But what are you going to do with your life? Arts majors, future plans, and career skills.* Poster presented at the Annual Convention of the National Association for Gifted Children, Orlando, Florida.
- Miller, A.L., & Dumford, A.D. (2016, November). *Do high achieving students benefit from honors college participation? A look at student engagement for first-year students and seniors.* Paper presented at the Annual Convention of the National Association for Gifted Children, Orlando, Florida.
- Dumford, A.D., & Miller, A.L. (2016, March). *Administering a Multi-Institution Online Alumni Survey: Lessons Learned.* Paper to be presented at the NASPA – Student Affairs Administrators in Higher Education Annual Conference, Indianapolis, Indiana.
- Dumford, A.D., & Miller, A.L. (2016, January). *Learning Online: Unintended Consequences for Engagement?* Paper to be presented at the Hawaii International Conference on Education, Honolulu, Hawaii.

Grants

Co-Principal Investigator, \$1,000,000 grant, <i>National Science Foundation</i>	submitted 5/2017
Methodology Consultant, <i>Associate of American Colleges and Universities</i>	Fall 2014-2017
Co-Principal Investigator, \$20,000 grant, <i>Tremaine Foundation</i>	Fall 2015-2016
Co-Principal Investigator, Arts Works program \$20,000 grant, <i>National Endowment for the Arts</i>	Fall 2013-2016

Professional Board Memberships
(additionally a reviewer for more than 20 other national and international journals)

Research in Higher Education, Consulting Editorial (CE) Board, 2013 to present
Journal of College Student Development, Editorial Board (3-year app), 2014 to 2017
 Association for Institutional Research Committee Visual Display of Data, 2014 to present

NATHAN W. FISK
Curriculum Vitae

College of Education
University of South Florida
4202 E. Fowler Avenue, EDU105
Tampa, FL 33612
Telephone: (813) 666-4184
E-mail: nfisk@usf.edu

EDUCATION

<p>Rensselaer Polytechnic Institute Doctor of Philosophy: Science & Technology Studies Dissertation Research: Trash Talk & Trusted Adults</p>	<p>Troy, NY Aug 2011</p>
<p>Rochester Institute of Technology Master of Science: Interdisciplinary Professional Studies Capstone Research: The Rochester Cyber Safety & Ethics Initiative</p>	<p>Rochester, NY Aug 2008</p>
<p>Rochester Institute of Technology Master of Science: Communication & Media Technologies Thesis Research: Social Learning Theory as a Model for Illegitimate P2P Use</p>	<p>Rochester, NY Sep 2006</p>
<p>Rochester Institute of Technology Bachelor of Science: Information Technology</p>	<p>Rochester, NY May 2004</p>

PROFESSIONAL APPOINTMENTS & EMPLOYMENT

<p>University of South Florida Assistant Professor of Cybersecurity Education</p>	<p>Tampa, FL Aug 2013–Present</p>
<p>Rochester Institute of Technology – Public Policy Visiting Assistant Professor</p>	<p>Rochester, NY Aug 2014–Aug 2015</p>
<p>Rensselaer Polytechnic Institute – Science & Technology Studies Lecturer/Adjunct</p>	<p>Troy, NY Aug 2011–Aug 2014</p>
<p>Rochester Institute of Technology – Information Technology Academic Excellence in Information Assurance Assessment Team</p>	<p>Rochester, NY Aug 2003–Aug 2004</p>

SELECTED PUBLICATIONS & WRITTEN WORKS

Framing Internet Safety: The Governance of Youth Online MIT Press <i>(Referred)</i>	Book Fall 2016
"...when no one is hearing them swear" Surveillance & Society <i>(Referred)</i>	Journal Article Fall 2014
Hackers and Hacking: A Reference Handbook ABC-CLIO Brief on Hackers and Criminality	Edited Volume Summer 2013

SELECTED AWARDS

Fulbright Cybersecurity Scholar Awarded for work at LSE on Parenting for a Digital Future project	London, UK Feb 2016
NSF/NSA GenCyber Grant Awarded for development of youth cybersecurity summer camp	Tampa, FL Feb 2016
NSF Dissertation Improvement Grant (#0957028) Awarded for youth internet safety dissertation research	Troy, NY Mar 2010

SELECTED CONFERENCE PRESENTATIONS

Association of Internet Researchers Policy Discourses of Youth Internet Safety	Phoenix, AZ Oct 2015
Center for Statesmanship, Law & Liberty Annual Symposium Balancing Security, Liberty & Privacy [Moderator]	Rochester, NY Apr 2015

SELECTED PROFESSIONAL SERVICE ACTIVITIES

National Initiative of Cybersecurity Education – Working Group Cybersecurity training and certifications	Tampa, FL Nov 2013–Current
EDUCAUSE – Training & Awareness Working Group Cybersecurity Awareness/Phishing	Tampa, FL Nov 2015–Current

BIOGRAPHICAL SKETCH

NAME: Smith, Glenn Gordon	POSITION TITLE: Associate Professor College of Education
University of South Florida, Tampa	

EDUCATION/TRAINING

INSTITUTION AND LOCATION	DEGREE	YEAR	FIELD OF STUDY
Arizona State University, AZ	BS	1984	Computer Science
University of Utah, UT	MA	1990	Computer Science
Arizona State University, AZ	Ph.D.	1998	Education

A. Personal Statement

As an Associate Professor in Instructional Technology, in the Dept. of Educational & Psychological Studies in the College of Education, for the last seven years I have devoted my technical computer science skills and knowledge of educational psychology towards *improving children's literacy*. Concerned that electronic media are outstripping books in popularity with children and adolescents, I have invented a new technology that combines web-based eBooks with computer games (to assess comprehension). My research group has used this to conduct studies on recreational reading, and also vocabulary learning, in the United States, China and the Netherlands. I have recently received a grant to develop and research adding *social elements* to reading in web-based eBooks with computer games. I am also Principal Investigator on an NSF grant to improve climate change science education in high school Marine Sciences courses, using a realistic science fiction eBook with computer games, as well as a local place based (i.e. Florida) approach, to make climate change science more personally relevant to high school students.

B. Positions and Employment

- 1998-2005 Teaching & Research Faculty, Department of Technology & Society, Stony Brook University
- 2005-2013 Assistant to Associate Professor, Program in Instructional Technology, Department of Secondary Education, University of South Florida
- 2015-Present Associate Professor, Program in Instructional Technology, Department of Educational & Psychological Studies, University of South Florida

C. Selected Partial List of Peer-reviewed Publications

- Nielen, T. M. J., Smith, G. G., Sikkema-de Jong, M. T., Drobica, J., van Hout, B., & Bos, A. G. (Accepted for publication). Digital guidance for susceptible readers: effects on fifth graders' reading motivation and incidental vocabulary learning, *Journal of Educational Computing Research*.
- Feldman, A., Nacion, M., Smith, G.G., & Besalti, M. (2017). Teaching climate change science to high school students: Local place-based approach, web-based novel with computer games, and hands-on activities. In I. Levin & D. Trybulsky (eds.), *Digital Tools and Solutions for Inquiry-Based STEM Learning*. New York, NY: IGI Global, doi: 10.4018/978-1-5225-2528-8.ch002-5225-2528-8.ch002

3. Smith, G. G., Li, M., Drobná, J., Park, H., Kim, D., & Smith, S. D. (2013). Play games or study? Computer games in eBooks to learn English vocabulary. *Computers & Education*, 69, 274-286. doi:10.1016/j.compedu.2013.07.
4. Smith, G. G. (2012). Computer-game play as imaginary stage for reading: Implicit spatial effects of computer games embedded in hard copy books. *Journal of Research in Reading*, 35(1), 1-19. doi:10.1111/j.1467-9817.2010.01447.x
5. Smith, G. G., Majcherek, D., Hayes, S., & Drobná, J. (2011). Computer games versus maps before reading stories: Priming readers' spatial situation models. *Educational Technology & Society*, 14(1), 158-168.
6. Smith, G. G., Sorenson, C., Gump, A., Heindel, A. J., Carr, M., & Martinez, C. D. (2011). Overcoming student resistance to group work: Online versus face-to-face. *The Internet and Higher Education*, 14, 121-128. doi:10.1016/j.iheduc.2010.09.005
7. Smith, G. G., Geiretson, H., Otkun, S., & Joutsenlahti, J. (2010). Effect of causal stories in solving mathematical story problems. *H. U. Journal of Education*, 39, 284-295.
8. Smith, G. G., & Ritzhaupt, A. (2010). Strategies in visuospatial working memory for learning virtual shapes. *Applied Cognitive Psychology*, 24, 1095-1114. doi:10.1002/acp.1620
9. Smith, G. G., Geiretson, H., Otkun, S., Yuan, Y., Dogbey, J., & Erdem, A. (2009). Skills, not full motion, for interactive spatial training: American, Turkish and Taiwanese female pre-service teachers learn spatial visualization. *Computers and Education*, 52, 201-209. doi:10.1016/j.compedu.2008.07.011
10. Tapscott, M., Smith, G. G., & White, J. (2009). Cultural diversity in online learning: A study of the perceived effects of dissonance in levels of individualism/collectivism and tolerance of ambiguity. *The Internet and Higher Education*, 11, 26-34. doi:10.1016/j.iheduc.2008.12.001
11. Smith, G. G., Heindel, A. J., & Torres, A. T. (2008). E-learning comradery or community: Disciplinary differences between online courses. *The Internet and Higher Education*, 1, 152-15. doi:10.1016/j.iheduc.2008.06.008
12. Smith, G. G., Torres-Ayala A. T., & Heindel, A. J. (2008). Disciplinary differences in e-learning instructional design. *Journal of Distance Education*, 22(2), 63-88.
13. Smith, G. G., Morcy, J., & Tjoe, H. (2007). Feature masking in computer game promotes visual imagery. *Journal of Educational Computing Research*, 36(3), 351-372. doi:10.2190/U124-1761-7PU5-3666
14. Smith, G. G. (2005). How do computer games affect your children? *Eurasian Journal of Educational Research*, 17, 72-80.
15. Smith, G. G., & Otkun, S. (2005). Why interactivity works: Interactive priming of mental rotation. *Journal of Educational Computing Research*, 32(2), 93-111. doi:10.2190/4KAS-03U/X-A70E-E53W
16. Smith, G. G., Ferguson, D., & Gupta, S. (2004). Diagrams and math notation in e-learning: Growing pains of a new generation. *International Journal of Mathematical Education in Science and Technology*, 33(3), 681-695. doi:10.1080/0020739042000232583
17. Smith, G. G., Otkun, S., & Middleton, J. A. (2003). Interactive versus observational learning of spatial visualization of geometric transformations. *Australian Educational Computing*, 18(1), 3-10.
18. Smith, G. G. (2001). Interaction evokes reflection: Learning efficiency in spatial visualization. *The Interactive Multimedia Electronic Journal of Computer-Enhanced Learning*, 3(2), 1735-1760.

D. Selected Grant

NSF, DRC-12

Smith (PI)

09/01/08-08/31/16

Climate Change Narrative Game Education (CHANGE). CHANGE's goal is to help high school students learn complex Global Climate Change (GCC) science by making it personally relevant and understandable.
Role: PI

Hene R. Berson, Ph.D.**Professor**

Department of Teaching & Learning
 University of South Florida
 4202 E Fowler Ave., EDU 202, Tampa, FL 33620
 (813) 974-7698
 herson@usf.edu

Professional Preparation

State University of New York at Buffalo	Buffalo, NY	Anthropology	B.A., 1987
The University of Toledo	Toledo, OH	School Psychology	M.Ed., 1990
The University of Toledo	Toledo, OH	School & Clinical Psychology	Ph.D., 1997

Appointments

2014-Present Professor, Department of Teaching and Learning, University of South Florida, Tampa, FL
 2010-2014 Professor, Department of Childhood Education and Literacy Studies, University of South Florida, Tampa, FL
 2004-2007 Associate Professor, Department of Childhood Education, University of South Florida, Tampa, FL
 2004-2007 Associate Professor, Department of Child and Family Studies, Louis de la Parte Florida Mental Health Institute, University of South Florida, Tampa, FL
 1998-2004 Assistant Professor, Department of Child and Family Studies, Louis de la Parte Florida Mental Health Institute, University of South Florida, Tampa, FL
 1997-1998 Postdoctoral Internship in Forensic Assessment of Child Maltreatment, Lowcountry Children's Center, Charleston, SC
 1995-1998 Therapist/Research Coordinator, Lowcountry Children's Center, Charleston, SC
 1990-1994 Psychology Assistant, Marriage & Family Therapy Associates, Toledo, OH
 1991-1992 School Psychology Intern, Toledo Public Schools, Toledo, OH
 1987-1991 Preschool Teacher & Administrative Assistant, Toledo, OH

Selected Relevant Publications

Berson, I. R., Berson, M. J., & Snow, B. (2017). Kid Citizen: Designing an app for inquiry with primary sources. *Social Education*, 81(2), 105-108.
 Kelly-Williams, S., Berson, I. R., & Berson, M. J. (2017). Tablet stuff but life still rough: Technology for early childhood sustainable development in Jamaica. *Discourse and Communication for Sustainable Education*, 8(1).
 Ward, J., Branton, S., Cross, M., & Berson, I. R. (2016). Exploring developmental appropriateness of multi-touch tables in PreKindergarten: A video analysis. *Journal of Research on Technology in Education*.
 Berson, M. J., & Berson, I. R. (2014). Bringing the cybersecurity challenge to the social studies classroom. *Social Education*, 78(2), 96-100.
 Berson, I. R., Cross, M. D., Ward, J., & Berson, M. J. (2014). People, places, and pandas: Engaging preschoolers with interactive whiteboards. *Social Studies and the Young Learner*, 26(4), 18-22.
 Berson, I. R., & Berson, M. J. (2014). Developing multiple literacies of young learners with digital primary sources. In W. Russell (Ed.), *Digital Social Studies* (pp. 45-60). Charlotte, NC: Information Age Publishing.
 Berson, I. R., & Berson, M. J. (2013). Exploring pathways toward global sustainability through information and communication technologies for young learners in developing nations: Myths and misapplications. In J. E. Davis & R. A. Diem (Ed.), *Sustainability, Growth, and Globalization: A Social Science Perspective* (pp. 69-83). Charlotte, NC: Information Age Publishing.

Berson, I. R., & Berson, M. J. (Eds.). (2010). *High-tech tots: Childhood in a digital world*. A Volume in I. R. Berson & M. J. Berson (Series Eds.) *Research in Global Child Advocacy*. Charlotte, NC: Information Age Publishing.

Berson, I. R. (2010). Framing children as citizens: A journey from the real world to digital spaces. In R. Diem & M. J. Berson (Eds.), *Technology in Retrospect: Social Studies Place in the Information Age 1984-2009*. Greenwich, CT: Information Age Publishing. Charlotte, NC: Information Age Publishing.

Berson, I. R., Berson, M. J., Desai, S., Falls, D., & Fensughty, J. (2008). An analysis of electronic media to prepare children for safe and ethical practices in digital environments. *Contemporary Issues in Technology and Teacher Education*, 8(3), 222-243.

Synergistic Activities

Core Faculty, National Center of Academic Excellence in Cyber Defense Research (CAE-R) Designation for the Florida Center for Cybersecurity (2017-2022). Co-developed and taught an undergraduate course on Cybersecurity and the Everyday Citizen, which has been approved as a Global Citizen course. The course focuses on personal, social and policy issues as well as addresses strategies to secure digital footprints and promote safe interactions in a public Internet and wireless world for students across all disciplines. Co-developed graduate course on Cybersecurity in the Schools, which provides education practitioners with the knowledge to understand opportunities and challenges associated with technology use and policies and equip aspiring and practicing leaders with the necessary tools to protect their schools while empowering children and youth to optimize the benefits of digital resources.

Student Mentoring: Ph.D. supervisor to students exploring integration of technology into early childhood contexts. Mentor female international students focused on capacity building in Ghana, Jamaica, Kuwait, and Saudi Arabia.

Research Collaborations: Visiting Scholar on Digitizing Early Childhood, Curtin University, Perth, Australia (2017); Invited Scholar, University of Southern California USC Shoah Foundation Primary School Pedagogy Initiative on Digital Testimony (2017); Invited Scholar, crimmex at International Scholarly Exchange on Education with Testimonies (2017); KidCitizen: Expandable Mobile and Online Apps for Elementary grades on Congress and Civic Participation, Library of Congress. Co-Principal Investigator. Funded at \$345,824 (2015-2018) Project focuses on development of a free cross-platform app that provides engaging game-based learning activities with primary-sources for children in grades K-5. I collaborate with Kid Citizen's interdisciplinary team of historians, educators, child development specialists, and game designers as we integrate the inquiry learning with game-based approaches; Building Blocks: Turtles, Bots, Dashes and Dots, University of South Florida College of Education Seed Funding. Co-Principal Investigator. Funded at \$21,589 Collaboration with USF Preschool for Creative Learning to explore the use of tangible technologies to develop computational thinking and social emotional skills of preschoolers; Teaching with Culturally-Specific Primary Sources in Puerto Rico and Florida to Build Social Capital Among Preservice Teachers, Library of Congress Teaching with Primary Sources (TPS) Eastern Region Program. Co-Principal Investigator. Funded at \$40,000. Collaboration with Universidad de Puerto Rico, Recinto de Río Piedras (UPR-PP) to explore the use of primary sources to challenge mainstream assumptions and views of Puerto Rico and to support application of the content and pedagogic approaches into early childhood and elementary classrooms.

Service: University of South Florida Office of Community Engagement and Partnerships Service-Learning Faculty Recognition (2017); USF Institute on Black Life (IBL) Advisory Committee Outstanding Faculty Service Award (2015); Hillsborough County Public Schools Early Childhood Initiative, providing professional development training and coaching on the use of tangible technologies in Head Start classrooms.

James E. Hatten, Ph.D. ♦ University of South Florida, Tampa FL 33620 ♦ jameshatten@usf.edu

Curriculum Vitae

CURRENT EMPLOYMENT

Instructor, University of South Florida (Tampa, Fla.) August 2015-present

- Full time Instructor I in the Instructional Technology program area in the Department of Educational and Psychological Studies, College of Education.
- Instructional Technology graduate certificate program coordinator

EDUCATION

Ph.D., Curriculum and Instruction, Concentration in Learning Technologies 2014
 University of Minnesota, Minneapolis, MN
 Dissertation: *Optimal Size For Online Asynchronous Text-Based Focus Group Discussions*
 Degree conferred: November 28, 2014
 Co-chairs: Aaron H. Deering, Ph.D. and Charles D. Miller, Ph.D.
 Committee members: Cassandra M. Schaber, Ph.D.; Richard A. Krueger, Ph.D.; Martha Thurlow, Ph.D.

M.Ed., Curriculum and Instruction, Concentration in Learning Technologies 2009
 Technology Enhanced Learning Certificate: K-12 Technology Integration
 University of Minnesota, Minneapolis, MN
 Thesis: *Interactive Design: Informing Better Design Through Client/Designer Collaboration*

B.S., English and Mass Communications (double-major); minor in Secondary Education 1997
 St. Cloud State University, St. Cloud, MN

TEACHING EXPERIENCE

University of South Florida: College of Education, Educational and Psychological Studies 2015-present

Instructor for EME 6207: *Web Design (3 credits)*. Online class.
 Fall 2017 (16 students, 1 section); Spring 2017 (18 students, 1 section); Fall 2016 (11 students, 1 section);
 Spring 2016 (13 students, 1 section); Fall 2015 (10 students, 1 section)

Instructor for EME 6208: *Interactive Media (3 credits)*. Face-to-face class.
 Fall 2017 (10 students, 1 section)

Instructor for EME 6457: *Distance Learning (3 credits)*. Online class.
 Summer 2017 (20 students, 1 section)

Instructor for EME 6208: *Interactive Media (3 credits)*. Online class.
 Summer 2016 (16 students, 1 section)

Instructor for EME 6215: *Instructional Graphics (3 credits)*. Online class.
 Fall 2017 (16 students, 1 section)

Instructor for EME 6209: *Digital Video (3 credits)*. Blended class.
 Spring 2017 (12 students, 1 section)

Instructor for EME 6936: *Online Teaching and Learning (3 credits)*. Online class.
 Spring 2017 (16 students, 1 section)

Instructor for EME 2040: *Introduction to Technology for Educators (3 credits)*. Face-to-face class.
 Fall 2016 (27 students, 1 section); Spring 2016 (52 students, 2 sections); Fall 2015 (59 students, 2 sections)

Instructor for EME 2040: *Introduction to Technology for Educators (3 credits)*. Online.
 Fall 2016 (29 students, 1 section)

University of Minnesota: College of Education and Human Development, Curriculum and Instruction 2010-2013

Instructor for CI 2133w/CI4133w *Intro to Technology & Ethics in Society/Technology & Ethics in Society*.
 Spring 2013 (20 students, 3 credits). Online.

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Instructor for CI 5362: *Foundations of Interactive Design for Web-Based Learning*
 Spring 2011 (17 students, 3 credits). Face-to-face. Fall 2010 (12 students, 3 credits). Face-to-face.
 Instructor for CI 5303: *Data Analysis and Information Design for Business and Education*
 Spring 2010 (21 students, 3 credits). Face-to-face.
 Instructor for EDHD 5007: *Technology for Teaching and Learning*
 Fall 2010, (22 students, 1.5 credits).

Edina High School, Edina, MN: English/Language Arts & Journalism teacher 2007-2008

Tartan Senior High School, Oakdale, MN: English/Language Arts teacher 2006-2007

Champlin Park High School, Champlin, MN: English/Language Arts & Journalism teacher 2003-2006

St. Francis Senior High School, St. Francis, MN: English/Language Arts & Journalism teacher 1997-2003

RESEARCH EXPERIENCE

Research Associate, Institute on Community Integration, Minneapolis, MN January 2015-present

Research and Training Center on Community Living (RTC). Roles: Developer 201X web and instructional designer

Research Fellow, National Center on Educational Outcomes, Minneapolis, MN 2011-2015

NCEO National Assessment Center 2011-2013

Role: Researcher fellow; web and instructional designer. Principal Investigator (PI): Martha Thurlow, Ph.D.
 Funding: Cooperative Agreement with the Research to Practice Division, Office of Special Education Programs, U.S. Department of Education (H325G110002)

Improving the Validity of Assessment Results for English Language Learners with Disabilities 2011-2014

Role: Researcher; Instructional Designer. Co-PIs: Laurene Christensen, Ph.D., Kristin Kline Liu, Ph.D.
 Funding: Enhanced Assessment Grant (S368A100011) from the U.S. Department of Education

Research Assistant: Learning Technologies-St. Paul Public Schools, Minneapolis, St. Paul MN 2010-2011

NEWSPAPER JOURNALISM EXPERIENCE

St. Paul Pioneer Press, St. Paul, MN: Sports copy editor, agate editor, and writer 1995-1997, 2000-2003

St. Cloud Times, St. Cloud, MN: Sports writer, columnist, copy editor, and agate editor 1989-1994

PUBLICATIONS & REPORTS

Liu, K. K., Thurlow, M. L., Ward, J., Hatten, J., & Christensen, L. L. (2014). Voices from the field: state assessments for ELLs with disabilities. Minneapolis, MN: University of Minnesota, Improving the Validity of Assessment Results for English Language Learners with Disabilities (IVARED). Retrieved from <http://www.cchd.umn.edu/nceo/OnlinePub/IVARED/FocusGroupReport.pdf>

Hatten, J. (2008). Using blogs and wikis for teaching high school journalism. In Beach, R., Anson, C., Breuch, L.-A. K., and Swain, T. *Teaching writing using blogs, wikis, and other digital tools* (pp. 172-173). Norwood, MA: Christopher-Gordon Publishers, Inc.

CONFERENCE PRESENTATIONS & POSTERS

Hatten, J. (2015, April). Utilization of Online Asynchronous Text-Based Focus Group Discussions to Improve Efficacy of Staff Development for Educators. In Annual Conference of the American Educational Research

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Association (AERA), Chicago, IL.

- Hatten, J., Christensen, L., Liu, K., Goldstone, L., & Tharlow, M. (2014, October). Elements of Successful Online Asynchronous Text-Based Discussions. In *Proceedings of World Conference on E-Learning in Corporate, Government, Healthcare, and Higher Education 2014*, Chesapeake, VA: AACE.
- Hatten, J. & Christensen, L. (2014). An Approach to Designing Effective PK-12 Online Professional Development Modules. In M. Searson & M. Ochoa (Eds.), *Proceedings of Society for Information Technology & Teacher Education International Conference 2014* (p. 1154). Chesapeake, VA: AACE.
- Hatten, J. & Christensen, L. (2013). These Aren't the Droids You're Looking For: Anticipating Participant Mind Tricks in Pilot Study Feedback Responses. In T. Bastians & G. Marks (Eds.), *Proceedings of World Conference on E-Learning in Corporate, Government, Healthcare, and Higher Education 2013* (pp. 1135-1136). Chesapeake, VA: AACE.
- Christensen, L., Alcaya, C., Ho, M., & Hatten, J. (2013). Improving the validity of assessment results for English language learners with disabilities. Council of Chief State School Officers National Conference on Student Assessment (CCSSO, NCSA), National Harbor, MD.
- Hatten, J., Christensen, L., Liu, K., & Goldstone, L. (2013, April). Discussant reaction to online asynchronous focus group participation: An examination of responses to the methodology. In Annual Conference of the American Educational Research Association (AERA), San Francisco, CA.
- Hatten, J., Goldstone, L., & Liu, K. (2012, Oct). Evaluating and improving online asynchronous focus groups conducted via learning management systems. In 26th Annual Conference of the American Evaluation Association (AEA), Minneapolis, MN: AEA.
- Hatten, J. & Christensen, L. (2012). Utilizing Online Technologies To Effectively Facilitate Data Gathering In Large-Scale Qualitative Research. In T. Bastians & G. Marks (Eds.), *Proceedings of World Conference on E-Learning in Corporate, Government, Healthcare, and Higher Education 2012* (p. 611). Chesapeake, VA: AACE.
- Liu, K., Hatten, J., Goldstone, L., Nguyen, H., & Larson, J. (2012, March 12) Qualitative research of ELLs with disabilities in online asynchronous environments. Poster presentation at College of Education and Human Development (CEHD) Research Day. McNamara Center, University of Minnesota, Minneapolis.
- Hatten, J. (2011). Proposing the 2(ICD) Design Model: How Interactive Inclusive Collaboration with the Client Informs Better Development and Design. In *Proceedings of World Conference on E-Learning in Corporate, Government, Healthcare, and Higher Education 2011* (pp. 1261-1267). Chesapeake, VA: AACE.
- Hatten, J. & Tholen Hatten, R. (2011). Transforming Collaboration into Cooperation: Fostering Positive Interdependence in Online Computer Supported Collaborative Learning Environments. In *Proceedings of World Conference on E-Learning in Corporate, Government, Healthcare, and Higher Education 2011* (pp. 1268-1275). Chesapeake, VA: AACE.
- Hatten, J. (2011). A Call for Essential Certification and Apprenticeship Socialization in K-12 Online Teaching. In M. Koehler & P. Mishra (Eds.), *Proceedings of Society for Information Technology & Teacher Education International Conference 2011* (pp. 4463-4467). Chesapeake, VA: AACE.
- St Louis, E., McCasley, P., Bresch, T. & Hatten, J. (2009). Artaura: Experiencing Art Through Art. In T.

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Bastlaem et al. (Eds.), *Proceedings of World Conference on E-Learning in Corporate, Government, Healthcare, and Higher Education 2009* (pp. 1993-1998). Chesapeake, VA: AACE.

CONFERENCE SYMPOSIA & WORKSHOPS

Liu, K., Hatten, J., & Nguyen, H. (2012, August). Improving assessment results for ELLs with disabilities. Minnesota Assessment Conference, Northwestern College, Roseville, MN.

Krueger, R., Casey, M.A., Ernst, D., Lee, M., Link, A., Sintjago, A., O'Leary, P., Hatten, J., O'Brien, M.K., Dismont, S., Lindsay, C., and Longley, N. (2012, March 29). Internet focus group interviewing. Conference Session at Minnesota Evaluation Studies Institute (MESI) Conference, St. Paul, Minnesota.

PROFESSIONAL HONORS & AWARDS

Nominee: Minnesota State Teacher of the Year, Education Minnesota 2001
 • Nominated by students and staff at St. Francis Senior High School.

SERVICE for PROFESSIONAL ORGANIZATIONS

AERA, Computer and Internet Applications in Education (CIAE) Special Interest Group (SIG) 2016-present
 • SIG Chair (tenure 2016-2018); Annual Meeting Reviewer (2016, 2017)

Watergrass Elementary School Advisory Committee (SAC), Wesley Chapel, FL. 2016-present

Wesley Chapel Athletic Association, Wesley Chapel, FL. 2015-present
 • Volunteer PONY A-Ball coach (2017); Volunteer T-Ball coach (2015-2016)

CIISA (Curriculum & Instruction Graduate Student Association) Ph.D. mentor, Minneapolis 2012-present
 • Served as mentor to five new Ph.D. students in Curriculum & Instruction

Institute on Community Integration (ICI)/SUMIT (St. Paul Public Schools) mentor 2011-2013
 • Served as mentor to a high school youths with disabilities each semester
 • The SUMIT (Skills Uniquely Marketable In Technology) Program is a collaborative effort of the St. Paul Public Schools – Focus Beyond Transition Services and community and business partners
 • Mentoring helps students with disabilities prepare for jobs

PROFESSIONAL AFFILIATIONS

Member, American Educational Research Association (AERA) 2010-present
 Member, Association for the Advancement of Computing in Education (AACE) 2010-present
 Member, American Evaluation Association (AEA) 2012-2013
 Member, National Council of Teachers of English (NCTE) 1995-2013
 Member, Minnesota State Coaches Association (MSCA) 1995-2008
 Member, Minnesota Council of Teachers of English (MCTE) 1995-2008
 Contributor, Associated Press 1989-2003
 Contributor, Knight-Ridder News Service 1995-2003
 Contributor, Gannet News Service 1980-1994

CONTACT INFORMATION

James Hatten, Ph.D.
 7353 Sugar Brook Place, Wesley Chapel, FL, 33545
 jameshatten@usf.edu
 (763) 350-0478

Yiping Lou, Ph.D.

Associate Professor and Program Coordinator, Instructional Technology
Department of Educational and Psychological Studies, University of South Florida

EDUCATION

Concordia University, Montreal, Canada	Educational Technology	Ph.D. 1999
McGill University, Montreal, Canada	Teaching English as a Second Language	M.Ed. 1992
Hangzhou University, Hangzhou, China	English Language and Literature	B.A. 1982

ACADEMIC EMPLOYMENT

2014 – present	Associate Professor and Program Coordinator, Instructional Technology, Department of Educational and Psychological Studies, College of Education, University of South Florida
2011 – 2014	Associate Professor, Instructional Technology, Department of Secondary Education, College of Education, University of South Florida
2005 – 2011	Associate Professor, Educational Technology Graduate Program, Department of Educational Theory, Policy and Practice (formerly Department of Educational Leadership, Research, and Counseling), Louisiana State University
1999 – 2005	Assistant Professor, Educational Technology Graduate Program, Department of Educational Leadership, Research, and Counseling, Louisiana State University

RESEARCH GRANTS AND AWARDS**Funded Research Grants**

Lou, Y. (2014-2017). *K-12 Math and Science Partnerships: Overview, Outreach, Value, and the University of South Florida*. Award #: 400-2355B-SC001. Federal Flow: US Department of Education (07000). Amount awarded: \$777,066. Role: PI.

Sedib, G., Lou, Y., Feldman, A. & Wang, P. (2013-2017). *Climate Change Accator Narrative Genre Education (CHANGE)*. National Science Foundation (NSF), Discovery Research K-12 (DRLK-12). Amount funded: \$449,972. Award #: 1316782. Role: Co-PI

Trotz, M. & Y. Lou. (2012-2017). *RET in Engineering and Computer Science Site: Winter Awareness Research and Education*. National Science Foundation (NSF), Division of Engineering Education and Centers. Award funded: \$500,000. Award #: 1209682. Role: Co-PI

Lou, Y. (2014-2015). *Race to the Top District Developed Assessments for Hard to Measure and Other Content Areas District Partnership Grant Assessment Training Development*. Award #: U00057-0-01282015. Federal Flow: US Department of Education (07000). Amount awarded: \$78,512. Role: PI.

Education Research Grant: *A Multi-Metric Approach to Assess the Impact of STEM Instructional Multimedia on Undergraduate Teaching and Learning Outcomes*. National Science Foundation, Award # 0811453 (2009-2010). PI: Victor Mizutka. Amount funded: \$355,517. Role: Collaborator.

Lou, Y. & Blamford, P. (2006-2009). *Analyzing and building science inquiry skills through evidence-based technology integration*. National Science Foundation, Teacher Professional Continuum, Award # 0554056. Amount awarded: \$394,650. Role: PI.

Honors and Awards

- Outstanding Research Presentation Award, American Educational Research Association's (AERA) Special Interest Group in Design and Technology for the paper, Tanner, O. D. & Lou, Y. (2017). *Designing and Assessing Learning in Digital Environments*, presented at AERA, April 27-May 1, 2017.
- Rated as the most viewed article in the journal of Educational Technology Research and Development (ETR&D) for three consecutive months in 2007. Lou, Y., Bernard, R.M., & Abrams, P.C. (2006). *Media and pedagogy in undergraduate distance education: A theory-based meta-analysis of the empirical literature*. *Educational Technology Research & Development*, 34(2), 141-176.
- *Research of Excellence Award*, Canadian Association of Distance Education, 2004. Bernard, R.M.,

Abrami, P.C., Lou, Y., Worney, L., Borokhovski, E., Wallis, P.A., Wade, A., & Fiore, M. (2004). How does distance education compare to classroom instruction? A meta-analysis of the empirical literature. *Review of Educational Research*.

- Selected as one of the best journal articles published in the *Journal of Research on Technology in Education* in the last five years, 2004-2009. MacGregor, S. K. & Lou, Y. (2004). Web-based learning: How task scaffolding and website design support the acquisition of knowledge. *Journal of Research on Technology in Education*, 37(2), 161-175.

RESEARCH PUBLICATIONS AND PRESENTATIONS

Selected Relevant Publications

Hart, J. & Lou, Y. (in press). The Impact of Technology Coaching on Technology Integration in K-12 Schools. In Arif Alben, Gloria Natividad, and Hale Egar (Eds.), *Learning, Design, and Technology: An International Compendium of Theory, Research, Practice and Policy: Literature Reviews and Systematic Reviews of Research*. Springer.

Lou, Y. & Moon-Michel, L. (in press). Using Activity Theory in Designing Science Inquiry Games. In Brad Hokeason, Greg Clinton, Karen Kaminsky (Eds.), *Educational Technology and Narrative: Story and Instructional Design*. Springer.

Tanner, G. D. & Lou, Y. (in press). Use of a Context-Based Science Narrative to Develop Situational Interest within a Digital Game. In Brad Hokeason, Greg Clinton, Karen Kaminsky (Eds.), *Educational Technology and Narrative: Story and Instructional Design*. Springer.

Lou, Y., Blaschard, P. & Kennedy, E. (2015). Development and validation of a science inquiry skills assessment. *Journal of Geoscience Education*, 61, 73-85.

Dubach, K. S., Lou, Y., & MacGregor, K. (2015). Discussion design and cognitive level of student dialogue in online courses. *American Journal of Distance Education*, 29, 283-296.

Lou, Y. (2012). Within-class grouping and student achievement. In Hattie, J. & Anderman, E. (Eds.), *International Handbook on Student Achievement*. Routledge Publishers.

MacGregor, S. K. & Lou, Y. (2011). Web-based learning: How task scaffolding and website design support the acquisition of knowledge. In Lynne Schrum (Ed.), *Considerations on technology and teachers: The best of JRTTE*. International Society for Technology in Education.

Lou, Y. (2009). Research on the effects of media and pedagogy in distance education. In Rogers, P. L., Berg, G. A., Brontshar, J. V., Howard, C., Justice, L., & Schenk, K. D. (Eds.), *Encyclopedia of Distance Learning, Second Edition*, (pp. 1766-1773). doi:10.4018/978-1-60166-198-8.ch260.

Neville, P. & Lou, Y. (2008). Technology adoption into teaching and learning by mainstream university faculty: A mixed methodology study revealing the "how, when, why, and why not". *Journal of Educational Computing Research*, 39(3), 235-265.

Lou, Y., Bernard, R.M., & Abrami, P.C. (2006). Media and pedagogy in undergraduate distance education: A theory-based meta-analysis of the empirical literature. *Educational Technology Research & Development*, 54(2), 141-176.

Lou, Y. (2004). Understanding process and affective factors in individual and small group learning with technology. *Journal of Educational Computing Research*, 31(4), 337-369.

Lou, Y. (2004). Learning to solve complex problems through online between-group collaboration. *Distance Education*, 25 (1), 49-66.

Lou, Y. & MacGregor, S. K. (2004). Enhancing project-based learning through online between-group collaboration. *Educational Research and Evaluation: Special Issue on Postsecondary Education*, 10(4-6), 419-440.

MacGregor, S. K. & Lou, Y. (2004). Web-based learning: How task scaffolding and website design support the acquisition of knowledge. *Journal of Research on Technology in Education*, 37(2), 161-175.

Bernard, R.M., Abrami, P.C., Lou, Y., Borokhovski, E., Wade, A., Worney, L., Wallis, P.A., Fiore, M., & Bueg, B. (2004). How does distance education compare to classroom instruction? A meta-analysis of the empirical literature. *Review of Educational Research*, 74(3), 379-439.

Bernard, R.M., Abrami, P.C., Lou, Y., & Borokhovski, E. (2004). A Methodological morass: How can we improve quantitative research in distance education? *Distance Education*, 25(2), 175-198.

Loe, Y., Dedie, H., & Rosenfield, S. (2003). Feedback model and successful e-learning. In Sam Naidu (Ed.), *Learning and teaching with technology: Principles and practices*. Pages 249-260. London and Sterling, VA: Kogan Page.

Loe, Y., Abrami, P. C., & d'Apollonia, S. (2001). Small group and individual learning with technology: A meta-analysis. *Review of Educational Research*, 71, 449-521.

De Simone, C., Loe, Y., & Schmid, R. F. (2001). Meaningful and interactive distance learning supported by the use of metaphor and synthesizing activities. *Journal of Distance Education*, 16(1), 85-101.

Loe, Y., Abrami, P. C., & Spence, J. C. (2000). Effects of within-class grouping on student achievement: An exploratory model. *The Journal of Educational Research*, 94(2), 101-112.

Abrami, P. C., Loe, Y., Chambers, B., Poulsen, C., & Spence, J. C. (2000). Why should we group students within-class for learning? *Educational Research and Evaluation*, 6(2), 158-179.

Abrami, P. C., Loe, Y., Chambers, B., Poulsen, C., & Spence, J. C. (1999). Within-class grouping: Evidence vs. conjecture. *National Institute Economic Review*, 169, 105-108.

Loe, Y., Abrami, P. C., Spence, J. C., Poulsen, C., Chambers, B., & d'Apollonia, S. (1997). Within-class grouping: A meta-analysis. In Dubinsky, E., Mathews, D. and others (Eds.), *Readings in cooperative learning for advanced mathematics* (pp. 109-131). Washington, DC, USA: The Mathematical Association of America.

Loe, Y., Abrami, P. C., Spence, J. C., Poulsen, C., Chambers, B., & d'Apollonia, S. (Winter 1996). Within-class grouping: A Meta-analysis. *Review of Educational Research*, 66, 423-458.

Recent Relevant Presentations at National and International Conferences

Tanner, O. & Loe, Y. (2017, April). Design of a Digital Science Inquiry-Based Assessment. Paper presented at the Annual Meeting of American Educational Research Association (AERA), April 27-May 1, 2017, San Antonio, TX.

Loe, Y. (2016, November). A theory-based design model for game-based science inquiry. Annual meeting Association of Educational Communications Technology (AECT), Las Vegas, Nevada.

Loe, Y., Mioss-Michel, L., Tanner, O., & Hooper, J. (2016, November). Game-based science inquiry learning and assessment. Annual meeting Association of Educational Communications Technology (AECT), Las Vegas, Nevada.

Culik, A. & Loe, Y. (2016, November). A systematic literature review on faculty members' lived experiences teaching online courses. Annual meeting Association of Educational Communications Technology (AECT), Las Vegas, Nevada.

Smith, G.G., Loe, Y., & Bezuki, M. (2016, November). Science fiction & games for climate change education. Annual meeting Association of Educational Communications Technology (AECT), Las Vegas, Nevada.

Tanner, O. & Loe, Y. (2016, November). Design, development, and evaluation of a serious game for assessment of student science inquiry skills. Annual meeting Association of Educational Communications Technology (AECT), Las Vegas, Nevada.

Williams-Shakespeare, E. & Loe, Y. (2016, November). Using design-based research and multi-media learning principles to design user experiences in an asynchronous e-learning module. Annual meeting Association of Educational Communications Technology (AECT), Las Vegas, Nevada.

Loe, Y. (2016, April). University and school partnership: Bring water sustainability research to high school classrooms through collaborative design of scenario-based science simulations and game. Paper accepted for presentation at the Annual Conference of American Educational Research Association (AERA), April 8-12, 2016, Washington, D.C.

Wright, H., Futas, A. R., Holmes, H., & Loe, Y. (2016, April). Classroom assessment: What type of learning is being measured? Paper accepted for presentation at the Annual Conference of American Educational Research Association (AERA), April 8-12, 2016, Washington, D.C.

Smith, G. G., Feldman, A., Tyndell Nation, M., Loe, Y., Chen, Y., Walker, C., & Wang, P. (2016, April). Computer Games in a Science Fiction Novel to Learn Climate Change Science. Annual meeting of the American Educational Research Association (AERA), April 8-12, 2016, Washington, DC.

Loe, Y., Tanner, O., Mioss-Michel, L., Prevost, L., Hooper, J., Han, J., Home, W. (2016, March). Game-Based Science Inquiry Learning and Assessment. Symposium presented at the Annual Conference of the Society of

Information Technology in Education (SITE), Savannah, GA, March 21-26, 2016.

Lou, Y., Hooper, J. & Blanchard, P. (2016, March). *Bald Eagle Adventure: A Game-Based Approach to Promoting Learning through Science Inquiry*. Paper presented at the Annual Conference of the Society of Information Technology in Education (SITE), Savannah, GA, March 21-26, 2016.

Lou, Y. & Moon-Michel, L. (2016, March). *Scenario-Based Learning Simulation of Thermal Heat Transfer*. Paper presented at the Annual Conference of the Society of Information Technology in Education (SITE), Savannah, GA, March 21-26, 2016.

Tanner, D. & Lou, Y. (2016). *Creating a Context for Visual Data in Science Learning Using Digital Games*. Paper presented at the Annual Conference of the Society of Information Technology in Education (SITE), Savannah, GA, March 21-26, 2016.

Nelson, M.T., Feldman, A., Smith, G., Wang, P., Lou, Y., (2016, Jan.). *Uncovering high school students' knowledge and beliefs about climate change to inform the development of embedded curriculum materials*. Paper presented at the International Meeting of Association for Science Teacher Education (ASTE), January 7-9, 2016, Reno, Nevada.

Courses Currently Tracking and Taught in the Instructional Technology Graduate Program at USF and LSU

- EME 6613 Development of Computer-Based Instruction
- EME 6936 Current Trends in Instructional Technology
- EME 7938 Computer-Augmented Instructional Paradigms in Education
- EME 7939 Research in Technology-Based Education
- ELRC4507 Computer Technology for Educators
- ELRC4535 Educational Telecommunications and Electronic Learning
- ELRC7503 Instructional Design and Development
- ELRC7505 Design and Development of Multimedia Instructional Units
- ELRC7506 Authoring Systems for Educators
- ELRC7517 Doctoral Seminar in Educational Media
- ELRC7525 Professional Development for K-12 Technology Integration
- ELRC7535 Advanced Telecommunications and Electronic Learning
- ELRC7550 Theory and Research in Educational Technology
- ELRC7890 Technology and Collaborative Learning
- ELRC7890 Implementing and Evaluating Technology-Enhanced Instruction

SERVICES

Journal Editorial Board

- Editorial Board, *Journal of Computing in Higher Education*, 2008-present
- Consulting Editor, *Educational Technology Research and Development*, 2006-present
- Editorial Review Board, *International Journal of Teaching and Learning in Higher Education*, 2006-present
- Reviewer, *Review of Educational Research*
- Reviewer, *Journal of Educational Evaluation and Policy Analysis*
- Reviewer, *Journal of Educational Computing Research*
- Reviewer, *Educational Research and Evaluation*

Michael J. Berson

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 University of South Florida
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 berson@usf.edu

Professional Preparation

State University of New York at Buffalo	Buffalo, NY	Political Science	B.A., 1987
The University of Toledo	Toledo, OH	Secondary Education	M.Ed., 1989
The University of Toledo	Toledo, OH	Curriculum & Instruction: Social Studies Education	Ph.D., 1993

Appointments

2006-present	Professor, University of South Florida, Department of Teaching and Learning, Tampa, Florida.
2001-2006	Associate Professor, University of South Florida, Department of Secondary Education, Tampa, Florida.
1998-2001	Assistant Professor, University of South Florida, Department of Secondary Education, Tampa, Florida.
1997-2007	Research and Development Partner, The Center for Technology and Teacher Education at the University Of Virginia's Curry School Of Education.
1995-2000	Educational Consultant, South Carolina Department of Education.
1994-1998	Assistant Professor, The Citadel, The Military College of South Carolina, Department of Education, Charleston, South Carolina.
1992-1994	Social Studies Department Chairperson, Ottawa Hills Local Schools, Toledo, Ohio.
1989-1994	Social Studies Teacher, Ottawa Hills Local Schools, Toledo, Ohio.

Selected Relevant Publications

Berson, I. R., Berson, M. J., & Snow, B. (2017). Kid Citizen: Designing an app for inquiry with primary sources. *Social Education*, 81(2), 105-108.

Kelly-Williams, S., Berson, I. R., & Berson, M. J. (2017). Tablet null but life still rough: Technology for early childhood sustainable development in Jamaica. *Discourse and Communication for Sustainable Education*, 8(1).

Berson, I. R., Berson, M. J., Dennis, D.V., & Powell, R. (2017). Leveraging literacy: Research on critical reading in the social studies. In M. M. Manfra & C. M. Bolick (Eds.), *Handbook of social studies research* (pp. 414-439). Boston, MA: Wiley-Blackwell.

Haas, B. J., Berson, M. J., & Berson, I. R. (2015). With their voice: Constructing meaning with digital testimony. *Social Education*, 79(2), 106-109.

Berson, M. J., & Berson, I. R. (2014). Bringing the cybersecurity challenge to the social studies classroom. *Social Education*, 78(2), 96-100.

Berson, I. R., Cross, M. D., Ward, J., & Berson, M. J. (2014). People, places, and pandas: Engaging preschoolers with interactive whiteboards. *Social Studies and the Young Learner*, 26(4), 18-22.

Berson, I. R., & Berson, M. J. (2014). Developing multiple iterations of young learners with digital primary sources. In W. Russell (Ed.), *Digital Social Studies* (pp. 45-60). Charlotte, NC: Information Age Publishing.

Berson, I. R., & Berson, M. J. (Eds.). (2010). *High-tech tox: Childhood in a digital world*. A Volume in I. R. Berson & M. J. Berson (Series Eds.) *Research in Global Child Advocacy*. Charlotte, NC: Information Age Publishing.

Dien, R. A., & Berson, M. J. (Eds.). (2010). *Technology in Retrospect: Social Studies in the Information Age, 1984-2009*. Charlotte, NC: Information Age Publishing.

VanDusen, P. J., & Berson, M. J. (Eds.). (2008). *The electronic republic? The impact of technology on education for citizenship*. West Lafayette, IN: Purdue University Press.

Synergistic Activities

Education/Teaching: Core Faculty, National Center of Academic Excellence in Cyber Defense Research (CAE-R) Designation for the Florida Center for Cybersecurity (2017-2022). Co-developed and taught an undergraduate course on Cybersecurity and the Everyday Citizen, which has been approved as a Global Citizen course. The course focuses on personal, social and policy issues as well as addresses strategies to secure digital footprints and promote safe interactions in a public Internet and wireless world for students across all disciplines. Co-developed graduate course on Cybersecurity in the Schools, which provides education practitioners with the knowledge to understand opportunities and challenges associated with technology use and policies and equip aspiring and practicing leaders with the necessary tools to protect their schools while empowering children and youth to optimize the benefits of digital resources.

Student Mentoring: Ph.D. supervisor and mentor to students exploring digital citizenship and the integration of technology into social studies teaching and learning

Research Collaborations: Visiting Scholar on Digitizing Early Childhood, Curtin University, Perth, Australia (2017); Invited Scholar, University of Southern California USC Shoah Foundation Primary School Pedagogy Initiative on Digital Testimony (2017); Invited Scholar, winners at International Scholarly Exchange on Education with Testimonies (2017); KidCitizen: Expandable Mobile and Online Apps for Elementary grades on Congress and Civic Participation, Library of Congress. Co-Principal Investigator. Funded at \$345,824 (2015-2018) Project focuses on development of a free cross-platform app that provides engaging game-based learning activities with primary-sources for children in grades K-5. I collaborate with Kid Citizen's interdisciplinary team of historians, educators, child development specialists, and game designers as we integrate the inquiry learning with game-based approaches; Building Blocks: Turtles, Bots, Dashes and Dots. University of South Florida College of Education Seed Funding. Co-Principal Investigator. Funded at \$25,589 Collaboration with USF Preschool for Creative Learning to explore the use of tangible technologies to develop computational thinking and social emotional skills of preschoolers; Teaching with Culturally-Specific Primary Sources in Puerto Rico and Florida to Build Social Capital Among Preservice Teachers. Library of Congress Teaching with Primary Sources (TPS) Eastern Region Program. Co-Principal Investigator. Funded at \$40,000. Collaboration with Universidad de Puerto Rico, Recinto de Río Piedras (UPR-RP) to explore the use of primary sources to challenge mainstream assumptions and views of Puerto Rico and to support application of the content and pedagogic approaches into early childhood and elementary classrooms.

Service: University of South Florida Office of Community Engagement and Partnerships Service-Learning Faculty Recognition (2017); USF Institute on Black Life (IBL) Advisory Committee Outstanding Faculty Service Award (2015); Senior Fellow for the Florida Joint Center for Citizenship and the Florida Partnership for Civic Learning, working on statewide curriculum and dissemination to promote high quality learning in the social studies; National Council for the Social Studies Community Technology Leadership Team, plan and deliver monthly training opportunities for teachers through social media forums.

Journal Editorial Boards: *Contemporary Issues in Technology and Teacher Education*, *Journal of Social Studies Research*, *Journal of Research on Technology in Education*, *The International Social Studies Forum Book Series*, and *Social Education*

Sanghoon Park, Ph.D.

Assistant Professor & M.Ed program Coordinator

Instructional Technology, Dept. of Educational and Psychological Studies, University of South Florida

Email address: park2@usf.edu

EDUCATION

Ph.D.	Major: Instructional Systems Minor: Measurement and Statistics <i>Florida State University</i>	Tallahassee, FL December, 2005
M.S.	Educational Technology <i>Hanyang University</i>	Seoul, Korea February, 2001
B.A.	Major: Educational Foundations Minor: English & English Literature <i>Kookmin University</i>	Seoul, Korea February, 1999

PROFESSIONAL EMPLOYMENT*Assistant Professor (Tenure track; Fall, 2013 – present)*

Instructional Technology / SLATE program

Department of Educational and Psychological Studies, College of Education

University of South Florida, Tampa, FL.

Terminated Associate Professor, Program Coordinator - M.Ed. & Ed.S. (Fall, 2011 – Summer, 2013)

Educational Technology, Gallupey College of Education and Human Development

Northwestern State University, Natchitoches, LA.

Assistant Professor (Fall, 2006 – Spring, 2011)

Educational Technology, Gallupey College of Education and Human Development

Northwestern State University, Natchitoches, LA.

TEACHING EXPERIENCE*University of South Florida (Fall 2013 – present)*

EME 6055: Current Trends in Educational Technology (Graduate)

EME 6208: Immersive Media (Graduate)

EME 6906: Independent Study (Graduate)

EDG 6975: Project: Master's/Specialist (Graduate)

EME 7458: Research in Distance Learning (Graduate)

LME 7900: Directed research in instructional technology (Graduate)

EME 7980: Dissertation (Graduate)

Northwestern State University (Summer 2006 – Summer 2011)

ETEC 5700: Technology Leadership in School (Graduate)

ETEC 5750: Production of Instructional Audio and Video (Graduate)

ETEC 5760: Design and Development of Multimedia Instructional Unit (Graduate)

ETEC 5790: Educational Technology Research, Evaluation, and Assessment (Graduate)

ETEC 5800: Interactive Multimedia Design and Development (Graduate)

ETEC 5810: Introduction to Human Performance Technology (Graduate)

ETEC 6450: Seminar in Current Research in Technology (Graduate)

EDUC 5010: Educational Research and Evaluation (Graduate)

EDUC 5850: Action Research for School Improvement (Graduate)

SCHOLARLY AWARDS AND HONORS

Burnsletter Award (2013), Association for Educational Communications and Technology (AECT), Division of Distance Learning (DDL).

Featured Research Award (2013), Association for Educational Communications and Technology (AECT), Division of Research and Theory (R&T).

Excellence in Teaching Award (2011), Gallupey College of Education and Human Development, Northwestern State University.

Mildred Hart Bailey Research Award (2011), Northwestern State University.

Best Paper Award (2006), AERA SIG-ATL/EST Best Paper Award (Paper title: Park, S., Keller, J., & Baylor, A. L. (2006). *The Effects of Selective Assortation and Pedagogical Agents' Role on Learning Interest, Achievement, and Attitude*)

Young Researcher Award (2006), AERA SIG-IT Young Researcher Award (Paper title: West, R. E., Polly, D., Waters, S., & Park, S. (2006). *From student to student: Strategies for successfully gaining graduate teaching experience*)

Award of Cochran Inter by Educational Communication Technology (ETC) Foundation (2006), the International Conference of Association of Educational Communications and Technology (AECT), Chicago, Illinois.

Gagne Briggs Outstanding Doctoral Student Award (2004-2005), Educational Psychology & Learning Systems, College of Education, Florida State University.

Ruby Diamond Future Professor Award (2004-2005), Educational Psychology & Learning Systems, College of Education, Florida State University.

Liliana Muhlman Manner Outstanding International Student Award (2005-2006), Educational Psychology & Learning Systems, College of Education, Florida State University.

GRANTS

Family

Park, S. (2016). Promoting STEM education using 3D Printers in an Elementary School (PI, New Matter Educate and Inspire Grant: 3 MOOD-4 3D printers 15 Spools of filament in a variety of colors, 3 packs of replacement print surfaces plates, Funded – approximately \$2,520.00)

<http://blog.newmatter.com/educate-inspire-grant-science-annotation/>

Park, S. (2015). Design, development, and evaluation of the ARPA (Augmented Reality with Pedagogical Agent) mobile learning system on renewable energy technology - University of South Florida New researcher grant (Funded, \$9,900.00)

Park, S. (2013). A comparative study on the use of motivational regulation strategies (MRSs) between online learning and classroom learning: relations with learners' use of cognitive learning strategy, engagement, and academic performance. Dept. of Secondary Education, University of South Florida (Funded, \$1,178.00)

Park, S. (2011). Melba Law Steeg Eminent Scholar Endowed Chair, Northwestern State University (Funded, \$5,000.00).

Park, S., Kim, K., & Pichon, H. (2010). Froyport McMoran Endowed Professorship in Pluralistic Education, Northwestern State University (Funded, \$6,295.00)

Gentry, V., McFovin, K., Duchard, B., Park, S., Morris, M., & Rhynes, M. (2009). Designing, Implementing, and Assessing Online Courses in Alternate Certification Programs. To offer high quality online instruction in all courses required for teacher certification in the areas of Elementary Education, Middle School Education, and Secondary Education. Louisiana Board of Regents (Funded, \$50,000.00)

Park, S., & Gentry, V. (2008). Creating a Shareable Digital Project – Turn On To Learning (TOFL). To provide Apple laptop computers to support teacher preparation programs at Northwestern State University, which in turn support 6th grade students and teachers at four schools in northwest Louisiana. Submitted to the Louisiana Dept. of Education (Funded, \$8,200.00)

Park, S. (2007). TechOnline: Design and development of conversational pedagogical agents embedded learning environment to promote students' learning and interest in Information Technology fields. NSU Enrichment fund (Funded, \$4,960.00)

Unfunded

Takoni, A., & Park, S. (2016). Virtual Teaching Assistant-supported Lab-in-a-bag (VITAL) model for Improving Students' Technical Skills Self-Learning in Electrical Engineering. National Science Foundation (Submitted, \$299,877.00)

Park, S. (2016). Augmented Reality Pedagogical Agent (ARPA) mobile learning cubes to promote elementary students' engagement and learning in science energy education. Spencer Foundation (unfunded, \$25,902.00)

Frygt, A., Park, S., & Kaplan, H. (2016). Promoting STEM interest of socioeconomically disadvantaged middle school students using theory-based motivational scaffolding combined with 3D printing Makerpace experiences. National Science Foundation (unfunded, \$319,095.00)

Frygt, A., Park, S., & Kaplan, H. (2015). EXP: Educational application for student engineers: 3D printing and 3D modeling - EASE 3D. National Science Foundation (unfunded, \$548,917.00)

Park, S. (2015). Design, development, and evaluation of the REEAL (Renewable Energy Education for All Learners) system, Microsoft research fund. (unfunded, \$100,000.00)

Park, S. (2013). Effects of an animated pedagogical agent delivered motivational regulation treatment on online learners' engagement and achievement, Research and Innovation office, University of South Florida (Unfunded, \$0,938.00)

PUBLICATIONS

Book

Park, S. (2010). *Positive emotion and multimedia learning: Promoting learning interest and motivation in multimedia learning using pedagogical agents*. IAP (ISSN: 1838301242)

Peer-reviewed book chapters

Park, S. (2017). Virtual pedagogical agents for English language teaching and learning. In J. I. Lianou (Ed.), *The TESOL Encyclopedia of English Language Teaching*. Hoboken, NJ: Wiley.

DuPont, J., Harff, S., Park, S., & Linder, K. E. (2017). Marketing online degrees to adult learners: Staff, resources, and key strategies. In A. Pina (Ed.), *Leading and Managing e-Learning: What the E-Learning Leader Needs to Know*. New York, NY: Springer.

Park, S. (2015). Virtual avatar as an emotional scaffolding strategy to promote interest in online learning environment. In S. Tettegah & M.Gutierrez (Eds.), *Emotions, Technology, Design & Learning*. New York, NY: Elsevier.

Park, S. (2015). Examining learning experience in two online courses using Web logs and experience sampling method (ESM). In B. Holmanson, G. Clinton, & M. W. Triscoy (Eds.), *The design of learning experience: Creating the future of educational technology*. New York, NY: Springer.

Happel, L., Park, S., & McBeide, R. (2013). The effects of student response systems (SRSs) on eighth grade pre-algebra students' achievement and engagement. In L. Liu, D. Gibson, & C. Maddux (Eds.), *Research Highlights in Technology and Teacher Education 2013*. Chesapeake, VA: Society for Information Technology & Teacher Education.

Peer-reviewed Journal articles

Park, S. (accepted). The effects of multimedia content design modalities on students' motivation and achievement in history. *Computers in the Schools*.

Park, S., & Yun, H. (in print). Relationships between motivational strategies and cognitive learning in distance courses. *Distance Education*, 36(1), 1-17

Park, S., Kaplan, H., Schaf, R., & Tridas, E. (in print). Makecourse-Air: Design and practice of a flipped engineering makerspace. *International Journal of Design for Learning*.

Park, S., & Gentry, V. (2017). Promoting pre-service teachers' multimedia design skills through collaborative multimedia service-learning (CMSL). *Journal of Service-Learning in Higher Education*, 6, 1-18.

Park, S. (2017). Analysis of time-on-task, behavior experiences, and performance in two online courses with different authentic learning tasks. *The International Review of Research in Open and Distributed Learning*, 18(2), 213-233.

Park, S. (2016). Analyzing and comparing online learning experience through micro level analytics. *Journal of Educational Technology Development and Exchange*, 8(2), 55-80.

Park, S. (2015). The effects of social cue principles on cognitive load, situational interest, motivation, and achievement in pedagogical agent multimedia learning. *Journal of Educational Technology & Society*, 18(4), 211-228.

Liu, S., & Park, S. (2015). Evaluation of the technology-infused foreign language program in a public, rural middle school. *Journal of Education and Human Development*, 4(3), 21-32.

Lee, J., Park, S., & Kim, K. (2012). Web-based adaptive testing system (WATS) for classifying students' academic ability. *Turkish online journal of distance education*, 13(4), 25-35.

Son, C., Park, S., & Kim, M. (2011). Linear text vs. Non-linear hypertext in handheld computers: Effects on declarative and structural knowledge, and learner motivation. *Journal of Interactive Learning Research*, 22(2), 243-257.

Park, S., & Lim, J. (2009). Empowering online learners through learner created learning contents (LCLC): Tools and practices. *Journal of the Korean School Textbook Research*, 10(3), 155-161.

Park, S., & Son, C. (2008). The functional analysis of handheld computers use in K-12 classrooms. *Journal for Computing Teachers: (Online)*

Park, S., & Lim, J. (2007). Promoting positive emotion in multimedia learning using visual illustrations. *Journal of Educational Multimedia and Hypermedia*, 16(2), 143-162.

Olim, Z., Reiser, R., Huang, X., Lim, J., & Park, S. (2006). Problem format and presentation sequence: Effects on learning and mental effort among U.S. high school students. *Applied Cognitive Psychology*, 26(3), 299-309.

Park, S., Kim, M., Lee, Y., Lee, M., & Son, C. (2005). The effects of visual illustrations on learners' achievement and interest in PDA (Personal Digital Assistant) based learning. *Journal of Educational Computing Research*, 31(2), 173-187.

Park, S., & Kwon, S. (2001). The effects of motivational strategy on learning and motivation. *Research in Educational Informatics & Broadcasting*, 7(2). (Written in Korean)

Under review

Park, S., & Yun, H. (under review). Exploring the influences of motivational regulation strategies on student engagement in higher distance education. *American Journal of Distance Education*

Park, S., & Yun, H. (under review). Motivation matters, but how?: Academic level and learning environment on the use of motivational regulation strategies and engagement in higher education. *British Journal of Educational Technology*

Park, S., & Rya, J.H. (under review). Exploring pre-service teachers' emotional experiences in an immersive virtual teaching simulation through facial expression recognition. *Computers & Education*

Park, S., Kaplan, H., Söhlal, R., & Tridas, E. (under review). Interdisciplinary flipped learning for engineering classrooms in higher education: Motivational experiences and achievement. *Teaching in Higher Education*

Park, S., & McLeod, K. (under review). Multimedia open educational resources in mathematics for high school students with learning disabilities. *Journal of Computers in Mathematics and Science Teaching*

Drobin, J., Park, S., & Smith, G. (under review). A tale of two avatars types: How perceptual and inquiry avatars influence English learners' interest, cognitive load, and reading comprehension in pedagogical agent-led online reading. *Computers & Education*

Jackson, J., & Park, S. (under review). Creating intelligent virtual patients for simulation-based pharmacy education through human-centered conversation modeling. *Journal of Formative Design in Learning*

PROFESSIONAL SERVICE

Service to the University, College, Program

- 2015. Distinguish University Professor selection committee
- 2015. Statewide evaluation team of three learning management systems
- 2015. Participant and supporter for 12 Week Faculty Writing PLC sponsored by the Academy for Teaching and Learning Excellence (ATLE), University of South Florida.
- 2015. Outstanding thesis and dissertation award selection committee, Office of graduate studies, University of South Florida
- 2015 - Academic program self-study report – Instructional technology
- 2015 – present: Graduate Policy Council (GPC) member/ sub-member
- 2013 – present: Coordinator of the M.Ed. in Instructional Technology program
- 2013 – present: Faculty advisor for Instructional Technology Student Association (ITSA).
- 2014 – 2015. Search committee member: Instructor in Instructional Technology
- 2014 – 2015. Search committee member: Faculty in Cybersecurity in education

Service to the Profession

Position at Professional Associations

- 2016 – present. Treasurer, SIG - Computer and Internet Applications in Education, AERA, USA.
- 2006 – present. Editorial Review Board member, *Journal of Interactive Learning Research (JILR)*, AACE, USA.
- 2007 – present. Editorial Review Board member, *Journal of Technology Integration in the Classroom*, a regional publication of Southeastern Teacher Education Association.

Conference program committee

- 2009 – present Program committee member for the Global Conference on Education and Research sponsored by University of South Florida, CELEDA (Cognition and Exploratory Learning in Digital Age); Chair of the Graduate Education and Faculty Development SIG sponsored by SITE (Society for Information Technology and Teacher Education); Program committee member for the International Conference on Advanced Learning Technologies (ICALT) 2014 - "Motivational and Affective Aspects in Technology-enhanced Learning" track; Review board member for AECT-LKAOE (Association of Educational Communication and Technology - Learning and Knowledge Analytics in Open Education) Summer International Research Symposium, Shanghai, China.
- 2004 – present. Conference Proposal Reviewer of IADIS (International Association for Development of the Information Society); ICALT (International Conference on Advanced Learning Technologies); ICLS (International Conference of the Learning Sciences); AERA (American Educational Research Association); AECT (Association for Educational Communications and Technology), USA.

Agenda Item: FL 109

USF Board of Trustees
March 6, 2018

Issue: B.S. Risk Management/Insurance – CIP 52.1701

Proposed action: Approval

Executive Summary: The Risk Management/Insurance (RMI) major is an undergraduate degree program focusing on course work relevant to careers in both Property & Casualty and Life & Health insurance. USF Sarasota-Manatee developed the RMI program in consultation with insurance industry representatives and will provide students with the skills needed to be successful in a career in any of the many facets of insurance.

Financial Impact: One full-time faculty member will be hired for the RMI program through revenues from anticipated enrollment growth. The program is designed to incorporate courses from other business disciplines, thus optimizing the resources already allocated to those areas to support RMI.

Strategic Goal(s) Item Supports:

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

BOT Committee Review Date: ACE February 13, 2018

Supporting Documentation Online (please circle):

Yes

No

[BOG Proposal](#)

[limited Access Form](#)

USF System or Institution specific: USF Sarasota-Manatee

Prepared by: James M. Curran, Ph.D., Dean University of South Florida Sarasota-Manatee
College of Business and Professor

Board of Governors, State University System of Florida

Request to Offer a New Degree Program

(Please do not revise this proposal format without prior approval from Board staff)

University of South Florida	Fall Semester 2018
Sarasota-Manatee	Proposed Implementation Term
University Submitting Proposal	Not Applicable
College of Business	Name of Department(s)/ Division(s)
Name of College(s) or School(s)	B.S. Risk Management/Insurance
Insurance	Complete Name of Degree
Academic Specialty or Field	
52.1701	
Proposed CIP Code	

The submission of this proposal constitutes a commitment by the university that, if the proposal is approved, the necessary financial resources and the criteria for establishing new programs have been met prior to the initiation of the program.

Date Approved by the University Board of Trustees	President	Date
Signature of Chair, Board of Trustees	Date	Vice President for Academic Affairs
		Date

Provide headcount (HC) and full-time equivalent (FTE) student estimates of majors for Years 1 through 5. HC and FTE estimates should be identical to those in Table 1 in Appendix A. Indicate the program costs for the first and the fifth years of implementation as shown in the appropriate columns in Table 2 in Appendix A. Calculate an Educational and General (E&G) cost per FTE for Years 1 and 5 (Total E&G divided by FTE).

Implementation Timeframe	Projected Enrollment (From Table 1)		Projected Program Costs (From Table 2)				
	HC	FTE	E&G Cost per FTE	E&G Funds	Contract & Grants Funds	Auxiliary Funds	Total Cost
Year 1	30	23	4,419	101,632			101,632
Year 2	35	25.5					
Year 3	45	35.5					
Year 4	55	39.5					
Year 5	65	46.25	3,553	164,313			164,313

Note: This outline and the questions pertaining to each section must be reproduced within the body of the proposal to ensure that all sections have been satisfactorily addressed. Tables 1 through 4 are to be included as Appendix A and not reproduced within the body of the proposals because this often causes errors in the automatic calculations.

INTRODUCTION

I. Program Description and Relationship to System-Level Goals

- A. Briefly describe within a few paragraphs the degree program under consideration, including (a) level; (b) emphases, including majors, concentrations, tracks, or specializations; (c) total number of credit hours; and (d) overall purpose, including examples of employment or education opportunities that may be available to program graduates.**

The Risk Management/Insurance (RMI) major is an undergraduate program to be housed in the College of Business, focusing on course work relevant to firms in both Property & Casualty and Life & Health insurance. The State University System of Florida (SUS) has determined through its gap analysis that the insurance industry is an area with critical workforce needs. Insurance industry executives in our service region have been quite emphatic in their requests for USF Sarasota-Manatee to help them develop a skilled workforce to fill their operational needs.

The RMI program began as a minor in Finance at USF Sarasota-Manatee in 2015 and is being offered for the first time as a major in Finance under the CIP code 52.0801 in 2017-2018.

The RMI major is a 21-credit major within the 120-credit bachelor's degree that will carry the additional core requirements of all other business majors. The major was developed after a thorough review of RMI programs around the country and in consultation with more than 20 industry executives, from companies such as FCCI, The Zenith, CBIZ, BB&T, State Farm, Boyd Insurance & Investment Services, Atlas Insurance, and others. Courses will provide students, who perform well, opportunities to receive credit toward professional designations, such as the [Chartered Property Casualty Underwriter](#) (CPCU), and to be eligible for professional licenses from Florida.

Employment opportunities available to graduates in the insurance industry include claims, underwriting, sales, risk analyst, accounting, systems, customer service, and others.

- B. Please provide the date when the pre-proposal was presented to CAVP (Council of Academic Vice Presidents) Academic Program Coordination review group. Identify any concerns that the CAVP review group raised with the pre-proposed program and provide a brief narrative explaining how each of these concerns has been or is being addressed.**

The CAVP reviewed the pre-proposal on April 14, 2017, with no concerns raised.

- C. If this is a doctoral level program please include the external consultant's report at the end of the proposal as Appendix D. Please provide a few highlights from the report and describe ways in which the report affected the approval process at the university.**

This is an undergraduate program, not a doctoral program.

- D. Describe how the proposed program is consistent with the current State University System (SUS) Strategic Planning Goals. Identify which specific goals the program will directly support and which goals the program will indirectly support (see link to the SUS Strategic Plan on [the resource page for new program proposal](#)).**

In its strategic plan for 2012 through 2015, the SUS set priorities for economic and workforce needs. That plan states:

The Board of Governors believes that its 2025 goals for the System should align with state economic and workforce needs through its targeted degree programs. Through the identification and monitoring of performance in specific areas of strategic emphasis like STEM and other critical need areas, as well as through the setting of strategic priorities in the New Florida

initiative, the Board has demonstrated its intent to increase degree and research production and to organize the System to be THE STATE UNIVERSITY SYSTEM of FLORIDA | Board of Governors | STRATEGIC PLAN 2012-2025 13 more productive in these specific strategic areas. (http://www.flbog.edu/pressroom/_doc/2011-11-28_Strategic_Plan_2012-2025_FINAL.PDF)

This Risk Management/Insurance program will immediately address at least three of the directional goals set by the SUS in its strategic plan, with those being:

- **Increase Community and Business Workforce**
- **Increase Levels of Community and Business Engagement**
- **Strengthen Quality & Recognition of Commitment to Community and Business Engagement**

Increase Community and Business Workforce: This program has been developed in collaboration with representatives from the insurance industry in Florida to specifically meet the substantial employment needs of the industry. There is a significant, ongoing need for a knowledgeable workforce in the insurance industry locally, within Florida, and around the country and offering this program will allow USF Sarasota-Manatee to provide the employees those firms seek.

Increase Levels of Community and Business Engagement: USF Sarasota-Manatee has already been engaged with many representatives of the insurance industry in developing this program. The interest from the insurance industry in this program is very strong. They are interested in working with USF Sarasota-Manatee to interest students in insurance as a major, they are willing to work with students as mentors, they are willing to help with courses as guest speakers or instructors, and they are willing to support USF Sarasota-Manatee financially as the program develops.

Strengthen Quality & Recognition of Commitment to Community and Business Engagement: The RMI program already strengthened USF Sarasota-Manatee's recognition in the insurance field through its collaboration with insurance firms to build a major that will best suit the needs of employers and students. This program will allow students, who wish to remain in the Sarasota-Manatee region, an opportunity to find employment in the region with a livable income. Students who wish to move elsewhere will also have ample opportunities in whichever locations they choose. This program will clearly demonstrate to the local community and the business community that USF Sarasota-Manatee is aware of their needs and expends the extra effort to address those needs.

The RMI program will likely also address a fourth SUS goal, that being **Increase Collaboration and External Support for Research Activity**, as it develops over time. As faculty in the RMI area engage in research, USF Sarasota-Manatee expects that they will seek out industry partnerships and pursue research that will be beneficial to the RMI industry, as well as the academic discipline.

- E. **If the program is to be included in a category within the Programs of Strategic Emphasis as described in the SUS Strategic Plan, please indicate the category and the justification for inclusion.**

The Programs of Strategic Emphasis Categories:

1. Critical Workforce:
 - Education
 - Health
 - Gap Analysis
2. Economic Development:
 - Global Competitiveness
3. Science, Technology, Engineering, and Math (STEM)

Please see the Programs of Strategic Emphasis (PSE) methodology for additional explanations on program inclusion criteria at [the resource page for new program proposal](#).

Insurance, under the CIP code of 52.1701, has been designated as a Program of Strategic Emphasis through the State University System's Critical Workforce Gap Analysis

(http://www.flbog.edu/pressroom/strategic_emphasis/). The RMI program will prepare students for careers in the insurance industry where there is a substantial and growing need for qualified employees in Florida. The current gap will be increasing in the coming years as many people currently working in insurance are expected to retire unless it is addressed through programs like USF Sarasota-Manatee's RMI.

F. Identify any established or planned educational sites at which the program is expected to be offered and indicate whether it will be offered only at sites other than the main campus.

All courses for the Risk Management/Insurance degree will be offered either at USF Sarasota-Manatee or online.

INSTITUTIONAL AND STATE LEVEL ACCOUNTABILITY

II. Need and Demand

- A. Need: Describe national, state, and/or local data that support the need for more people to be prepared in this program at this level. Reference national, state, and/or local plans or reports that support the need for this program and requests for the proposed program which have emanated from a perceived need by agencies or industries in your service area. Cite any specific need for research and service that the program would fulfill.**

According to the Insurance Information Institute (<http://www.iii.org/fact-statistic/industry-overview>) 5,926 insurance companies were operating in the United States in 2015. Employment in the insurance industry has grown by more than 12% between July of 2011 and July of 2017 to more than 2.6 million people according to the United States Department of Labor's Bureau of Labor Statistics (https://data.bls.gov/timeseries/CES5552400001?amp%253bdata_tool=XGtable&output_view=data&include_graphs=true). This number continues to grow by approximately 2% per year. Of those employees, 159,900 were working in the state of Florida according to the Florida Department of Economic Opportunity (<http://www.floridajobs.org/labor-market-information/data-center/statistical-programs/current-employment-statistics>).

According to a survey completed by Great Insurance Jobs.com (http://images.greatinsurancejobs.com/pdfs/gij-whitepaper/2017_Great_Insurance_Jobs_Insurance_Industry_Employment_Outlook.pdf), over 10,800 jobs were open in the year 2016 with another 11,000 jobs expected to open during 2017. Ninety-three percent (93%) of the insurance companies participating in the survey had job openings at the time they were surveyed. The respondents indicate that the insurance industry is also expecting approximately 25% of its current workforce to retire in the next four years.

A survey in August 2017 of insurance firms located in the USF Sarasota-Manatee service area reported at least 250 job openings at a variety of levels, and this number was expected to increase by year's end.

- B. Demand: Describe data that support the assumption that students will enroll in the proposed program. Include descriptions of surveys or other communications with prospective students.**

Currently, employer demand is stronger than student demand. Therefore, educating students about the possibilities in RMI will be a shared effort between USF Sarasota-Manatee and its local insurance companies. Students are largely unaware of the insurance industry, the myriad career opportunities that exist within it, and its starting salaries. Students who took the first Risk Management/Insurance courses now work for a local insurance company. They have returned to campus to recruit more students to follow the path that they took into an interesting industry with good growth potential. They all admit that they knew nothing about the insurance industry until they took the courses and would not have considered a career in insurance without knowing what they learned from those courses.

USF Sarasota-Manatee has been offering courses in insurance since 2015 when RMI was introduced as a minor under the finance major. Enrollments in the Principles course has grown from 23 students in 2015 to the course maximum of 30 students in 2016 and 2017. Florida State University offers the only other RMI program in the SUS and enrollments in its RMI program have grown from 84 students in 2014 to 230 students in 2016. Yet, this growth is not enough to cover the employer demand in Florida.

- C. If substantially similar programs (generally at the four-digit CIP Code or 60 percent similar in core courses), either private or public exist in the state, identify the institution(s) and geographic location(s). Summarize the outcome(s) of communication with such programs with regard to the potential impact on their enrollment and opportunities for possible collaboration (instruction and research). In Appendix C, provide data that support the need for an additional program.**

Florida State University offers the only existing Risk Management/Insurance undergraduate degree program in Florida. No other programs at the four-digit CIP code level exist in Florida.

- D. Use Table 1 in Appendix A (1-A for undergraduate and 1-B for graduate) to categorize projected student headcount (HC) and Full Time Equivalents (FTE) according to primary sources. Generally undergraduate FTE will be calculated as 30 credit hours per year and graduate FTE will be calculated as 24 credit hours per year. Describe the rationale underlying enrollment projections. If students within the institution are expected to change majors to enroll in the proposed program at its inception, describe the shifts from disciplines that will likely occur.**

Calculation of student FTE is based on the typical distribution of full- and part-time students who attend USFSM. Generally, half of USFSM undergraduates attend full time, represented in the calculations as 1 FTE, and half attend part time, represented in the calculations and .5 FTE.

It is expected that a small number of students who might have taken the Finance or General Business majors may gravitate toward RMI when the new major is offered for the first time. USF Sarasota-Manatee is currently offering RMI under the Finance CIP code for the first time. The headcount in the major has grown by 10%, with some of this growth attributable to the availability of the RMI program. Longer term, USF Sarasota-Manatee expects that most of the students in the RMI program will enter the University specifically for RMI, which should increase the College's overall student population rather than cannibalize other majors. The RMI program serves as a next step for students who begin their college careers at State College of Florida Manatee-Sarasota (SCF) in its Insurance associate's degree program, potentially bringing more transfers from SCF. USF Sarasota-Manatee has already had students transfer from other institutions, because they are interested in pursuing the major and careers in the Insurance field.

- E. Indicate what steps will be taken to achieve a diverse student body in this program. If the proposed program substantially duplicates a program at FAMU or FIU, provide, (in consultation with the affected university), an analysis of how the program might have an impact upon that university's ability to attract students of races different from that which is predominant on their campus in the subject program. The university's Equal Opportunity Officer shall review this section of the proposal and then sign and date Appendix B to indicate that the analysis required by this subsection has been completed.**

USF Sarasota-Manatee is committed to attracting and retaining a diverse student body and the steps taken to recruit for all programs will be used for the RMI program as well. Some of those steps are as follows:

- Admissions utilizes a Customer Relationship Management (CRM) System to manage prospective student information and to execute a communication plan consisting of mail, email, and phone call campaigns. They have communication in place that is designed to reach and attract diverse

student body. Some examples include sharing profiles and testimonials of current students and alumni who are from underrepresented populations.

- USF Sarasota-Manatee has an Admissions Counselor for Diversity Recruitment and one of her responsibilities will be developing relationships with community partners like Upward Bound programs, College Reach Out programs, Take Stock in Children, Boys and Girls Club, Y Achievers, and other community groups. She also assists with communication to these partners about what USF Sarasota-Manatee has to offer and assisting them with setting up special group visits to campus.
- USF Sarasota-Manatee has a Bilingual Spanish Speaking Admissions Counselor to work with Hispanic students and their families on the admissions process.
- Representatives attend college fairs in the local market as well as visiting local high schools to give presentations and provide information on USF Sarasota-Manatee and its academic programs.
- Admissions representatives meet with prospective students at their high schools for instant decision days in the fall and offer on the spot acceptance to qualified students. Students who do not meet admissions requirements at that time are given guidance on what they can do to strengthen their application.
- Admissions purchases contact information of high school students who take the ACT and/or SAT to then communicate with them about USF Sarasota-Manatee and its academic programs. They are then able to target students by demographics and geographic locations.
- Admissions hosts open house programs, information sessions, and other events on campus for all potential students.
- USF Sarasota-Manatee representatives visit local state college and community colleges to attend events, set up information tables, or to speak to classrooms of students.
- The FUSE program at the State College of Florida is in place to co-advise SCF students on their courses based on their intended major at USF Sarasota-Manatee and to provide them with opportunities to participate in USF Sarasota-Manatee student life activities and events.

The Risk Management/Insurance program does not duplicate any programs offered at either FAMU or FIU.

III. Budget

- A. **Use Table 2 in Appendix A to display projected costs and associated funding sources for Year 1 and Year 5 of program operation. Use Table 3 in Appendix A to show how existing Education & General funds will be shifted to support the new program in Year 1. In narrative form, summarize the contents of both tables, identifying the source of both current and new resources to be devoted to the proposed program. (Data for Year 1 and Year 5 reflect snapshots in time rather than cumulative costs.)**

The data contained in Table 2 shows the amount of E&G money required to deliver courses needed for the RMI major. Faculty salaries and benefits for Year 1 include the teaching portion of one full-time position in RMI and part of the salaries for faculty who teach in other related disciplines. The RMI program has been constructed to optimize the college resources by including courses from other disciplines as part of the RMI major, which allows the College to serve RMI students while also filling courses from other disciplines. All of the courses are relevant to the RMI industry and the structure of the program has been discussed with industry experts. The change from Year 1 to Year 5 represents the addition of one faculty member dedicated to RMI in the third year. Table 3 contains all zeros because no funding is being reallocated.

- B. **Please explain whether the university intends to operate the program through continuing education, seek approval for market tuition rate, or establish a differentiated graduate-level tuition. Provide a rationale for doing so and a timeline for seeking Board of Governors' approval, if appropriate. Please include the expected rate of tuition that the university plans to charge for this program and use this amount when calculating cost entries in Table 2.**

The university will offer this program in the same standard manner as its other degree programs.

- C. **If other programs will be impacted by a reallocation of resources for the proposed program, identify the impacted programs and provide a justification for reallocating resources. Specifically address the potential negative impacts that implementation of the proposed program will have on related undergraduate programs (i.e., shift in faculty effort, reallocation of instructional resources, reduced enrollment rates, greater use of adjunct faculty and teaching assistants). Explain what steps will be taken to mitigate any such impacts. Also, discuss the potential positive impacts that the proposed program might have on related undergraduate programs (i.e., increased undergraduate research opportunities, improved quality of instruction associated with cutting-edge research, improved labs and library resources).**

No other programs will be impacted by a reallocation of resources.

- D. **Describe other potential impacts on related programs or departments (e.g., increased need for general education or common prerequisite courses, or increased need for required or elective courses outside of the proposed major).**

There will be no significant impact on related programs or departments. Elective courses in other disciplines may have slightly increased enrollments but there is adequate capacity in those courses to accommodate any expected increase.

- E. **Describe what steps have been taken to obtain information regarding resources (financial and in-kind) available outside the institution (businesses, industrial organizations, governmental entities, etc.). Describe the external resources that appear to be available to support the proposed program.**

Discussions have been held with insurance industry representatives and they are open to the idea of offering financial support for student scholarships and support of the RMI program. Insurance firms and industry-related organizations have supported other RMI programs around the country with significant donations to support scholarships, faculty chairs, and professorships. This type of external support will be pursued as the program grows.

IV. **Projected Benefit of the Program to the University, Local Community, and State**

Use information from Tables 1 and 2 in Appendix A, and the supporting narrative for "Need and Demand" to prepare a concise statement that describes the projected benefit to the university, local community, and the state if the program is implemented. The projected benefits can be both quantitative and qualitative in nature, but there needs to be a clear distinction made between the two in the narrative.

The benefits to the university are the addition of a program, not currently available, that has been designated as an area of strategic emphasis by the SUS and an opportunity to serve students with an interest in the RMI field, along with an important industry operating within our service region and across the state. The benefits to the local community and state are: well-prepared prospective employee and taxpayers able to fill a growing significant void in a major industry in Florida. If industry estimates are accurate, there will be more than 40,000 jobs available in insurance over the next five years in the State of Florida. These jobs are stable with significant opportunity for upward mobility for skilled individuals.

V. **Access and Articulation – Bachelor's Degrees Only**

- A. **If the total number of credit hours to earn a degree exceeds 120, provide a justification for an exception to the policy of a 120 maximum and submit a separate request to the Board of Governors for an exception along with notification of the program's approval. (See criteria in Board of Governors Regulation 6C-8.014)**

This degree can be completed in 120 credit hours.

- B. List program prerequisites and provide assurance that they are the same as the approved common prerequisites for other such degree programs within the SUS (see link to the Common Prerequisite Manual on [the resource page for new program proposal](#)). The courses in the Common Prerequisite Counseling Manual are intended to be those that are required of both native and transfer students prior to entrance to the major program, not simply lower-level courses that are required prior to graduation. The common prerequisites and substitute courses are mandatory for all institution programs listed, and must be approved by the Articulation Coordinating Committee (ACC). This requirement includes those programs designated as “limited access.”**

If the proposed prerequisites are not listed in the Manual, provide a rationale for a request for exception to the policy of common prerequisites. NOTE: Typically, all lower-division courses required for admission into the major will be considered prerequisites. The curriculum can require lower-division courses that are not prerequisites for admission into the major, as long as those courses are built into the curriculum for the upper-level 60 credit hours. If there are already common prerequisites for other degree programs with the same proposed CIP, every effort must be made to utilize the previously approved prerequisites instead of recommending an additional “track” of prerequisites for that CIP. Additional tracks may not be approved by the ACC, thereby holding up the full approval of the degree program. Programs will not be entered into the State University System Inventory until any exceptions to the approved common prerequisites are approved by the ACC.

In addition to general education requirements that all USF Sarasota-Manatee students must complete, the RMI program prerequisites are exactly the same as all of the other majors offered within the College of Business. These include the following state-mandated common prerequisites as described in the [Common Prerequisites Manual](#):

- ACG 2021 Principles of Financial Accounting
- ACG 2071 Principles of Managerial Accounting
- CGS 2100 Computers in Business
- ECO 2013 Macroeconomics
- ECO 2023 Microeconomics
- MAC 2233 Business Calculus
- STA 2023 Introductory Statistics I

- C. If the university intends to seek formal Limited Access status for the proposed program, provide a rationale that includes an analysis of diversity issues with respect to such a designation. Explain how the university will ensure that Florida College System transfer students are not disadvantaged by the Limited Access status. NOTE: The policy and criteria for Limited Access are identified in Board of Governors Regulation 6C-8.013. Submit the Limited Access Program Request form along with this document.**

All undergraduate degree programs in the College of Business are currently approved as limited-access based solely on minimum student grade-point average (GPA) and completed prerequisite coursework. Students who have earned a GPA of 2.75 or higher are admissible to the College and eligible to pursue this major. A Limited Access Program Request is being submitted along with this document.

- D. If the proposed program is an AS-to-BS capstone, ensure that it adheres to the guidelines approved by the Articulation Coordinating Committee for such programs, as set forth in Rule 6A-10.024 (see link to the Statewide Articulation Manual on [the resource page for new program proposal](#)). List the prerequisites, if any, including the specific AS degrees which may transfer into the program.**

The RMI program is not part of the AS-to-BS program.

INSTITUTIONAL READINESS

VI. Related Institutional Mission and Strength

- A. Describe how the goals of the proposed program relate to the institutional mission statement as contained in the SUS Strategic Plan and the University Strategic Plan (see link to the SUS Strategic Plan on [the resource page for new program proposal](#)).**

The SUS mission statement reads as follows:

The mission of the State University System of Florida is to provide undergraduate, graduate and professional education, research, and public service of the highest quality through a coordinated system of institutions of higher learning, each with its own mission and collectively dedicated to serving the needs of a diverse state and global society (http://www.flbog.edu/pressroom/_doc/2011-11-28_Strategic_Plan_2012-2025_FINAL.PDF).

The mission statement for USF Sarasota-Manatee reads as follows:

The University of South Florida Sarasota-Manatee provides high quality bachelor’s and graduate-level education and scholarly activity in a personalized learning community that prepares successful leaders and responsible citizens (<http://USF Sarasota-Manatee.edu/about-USF Sarasota-Manatee/mission/>).

The goals of the RMI program relate to exposing students to the many facets of the insurance industry and to prepare them for the various career opportunities available in insurance. This fits with the SUS mission in that these students will be prepared to fill the needs of an important industry in Florida. The RMI program also fulfills the USF Sarasota-Manatee goal of preparing students to be successful leaders in the insurance industry.

- B. Describe how the proposed program specifically relates to existing institutional strengths, such as programs of emphasis, other academic programs, and/or institutes and centers.**

The Risk Management Insurance program will provide resources to students and employers as a program listed in the Board of Governors’ Gap Analysis programs of strategic emphasis. There will be plentiful opportunities for students who graduate from the RMI program for not only employment but also rapid advancement. The insurance industry is growing at a rate of about 2% per year, according to the U.S. Department of Labor’s Bureau of Labor Statistics, and industry sources, such as [Jacobs Online](#) (page 3), expect a significant number, up to 25%, of older workers in the industry to retire in the next few years.

This particular RMI program was designed to complement the other business majors offered, including courses that are electives in those other business areas. Consultations with local insurance industry representatives showed strong support for a managerial approach that includes courses relevant to finance, marketing, and management in addition to courses pertinent to specific RMI functions.

- C. Provide a narrative of the planning process leading up to submission of this proposal. Include a chronology in table format of the activities, listing both university personnel directly involved and external individuals who participated in planning. Provide a timetable of events necessary for the implementation of the proposed program.**

The Risk Management/Insurance program began as an effort to collaborate with executives from local insurance firms who are in serious need of skilled employees for openings that they are having a difficult time filling.

Planning Process

Date	Participants	Planning Activity
Fall 2014	Dr. Robert Anderson, Lisa Krouse	Initial discussions about USF Sarasota-

	(FCCI), Dr. Thomas Pencek, Dr. Ned Wilson (FCCI)	Manatee offering courses in insurance
Fall 2014	Dr. Robert Anderson, Dr. Thomas Pencek, Dr. James Curran, Dr. Ned Wilson (FCCI)	Structure of a minor in Risk Management/Insurance developed and key courses identified
Spring 2016	Dr. James Curran and Dr. Ned Wilson (FCCI)	Discussions about developing RMI as a major to serve RMI industry needs. Research conducted on structure of RMI programs being offered around the country. Proposal for RMI major developed.
June 27, 2016	Dr. James Curran, Casey Welch, Kathleen Curran, Dr. Ned Wilson (FCCI), Lisa Krouse (FCCI), Ann Driscoll (FCCI), Tracy Stoeckel (FCCI), Karen Nysten Dederling (FCCI), Ursula Nixon, (The Zenith), Taylor Hendrick (The Zenith), Gene Donnelly (The Zenith), Keith Mercier (CBIZ), Patrick Wright (CBIZ), Michele Schrotter (Bouchard Insurance), Phillip Baker (Boyd Insurance & Investment Services), Annie LaRiviere (Atlas Insurance), Rob Brown (Atlas Insurance), David Ford-Coates (BB&T), George Quarterman (State Farm), Andrea Allison (Al Purmort Insurance), Taylor Collins (Professional Benefits Inc.), Jason Slack (Stahl & Associates)	Meeting to discuss the structure of a possible new major in Risk Management/Insurance. Industry representatives were very supportive of proposed program and encouraged USF Sarasota-Manatee to offer it.
December 19, 2016	Dr. James Curran, Lisa Krouse (FCCI), Keith Mercier (CBIZ), Patrick Wright (CBIZ)	Follow-up meeting where industry representatives confirmed their strong desire to have USF Sarasota-Manatee offer a major in RMI and discussed how they could work with USF Sarasota-Manatee to advance and support the program.

Events Leading to Implementation

Date	Implementation Activity
2/3/2015	RMI Minor approved by Academic Programs Committee (APC)
2/3/2015	First three RMI courses approved by APC. Those courses were RMI 3011 (Principles of Insurance), RMI 4292 (Property and Casualty Insurance Operations), and RMI 4941 (Risk Management/Insurance Internship).
Fall 2015	First RMI courses offered as special topics courses under Finance major. (RMI course numbers had not yet cleared State Course Numbering System processing) RMI Minor offered for the first time.
3/3/2017	RMI Major approved by APC under CIP code 52.0801 (Finance)
3/7/2017	Preproposal for RMI Major under CIP code 52.1701 (Insurance) approved by APC
3/27/2017	Preproposal for RMI Major under CIP code 52.1701 (Insurance) approved by APAC
4/14/2017	Preproposal for RMI Major under CIP code 52.1701 (Insurance) approved by CAVP
6/8/2017	Preproposal for RMI Major under CIP code 52.1701 (Insurance) approved by

	Board of Trustees
6/22/2017	Preproposal for RMI Major under CIP code 52.1701 (Insurance) approved by Board of Governors
Fall 2017	Proposal for RMI Major under CIP code 52.1701 (Insurance) submitted for approval

VII. Program Quality Indicators - Reviews and Accreditation

Identify program reviews, accreditation visits, or internal reviews for any university degree programs related to the proposed program, especially any within the same academic unit. List all recommendations and summarize the institution's progress in implementing the recommendations.

The College of Business is accredited by the Association to Advance Collegiate Schools of Business (AACSB) (<http://www.aacsb.edu/>). The College will be undergoing a Continuous Improvement Review (CIR) by AACSB in the Spring of 2018. These CIR reviews are conducted every five years. There have been no recommendations made related to the RMI program because the program was initiated after the last review in 2013.

VIII. Curriculum

A. Describe the specific expected student learning outcomes associated with the proposed program. If a bachelor's degree program, include a web link to the Academic Learning Compact or include the document itself as an appendix.

Graduates of the USF Sarasota-Manatee RMI program will:

- Demonstrate knowledge of corporate structure, governance, and organizational goals of insurance companies and how these insurance companies operate and make/earn profits.
- Demonstrate a working knowledge of the terminology common to the insurance industries and their operations.
- Demonstrate an understanding of property/casualty, life, and health care products and services and the consumers to whom they are being sold.
- Demonstrate an understanding of major contract provisions commonly found in policies and explain how limits, deductibles and coinsurance impact coverage.
- Demonstrate an understanding of the important environmental factors that influence policy costs, including competition, regulations, economy, etc.
- Demonstrate an ability to engage in critical thinking.
- Demonstrate an ability to communicate effectively.

The Academic Learning Compact can be found at <https://usf.app.box.com/s/sju3n8ssc6o5xgeep824yn1okp81dm7g>

B. Describe the admission standards and graduation requirements for the program.

RMI admissions standards are the same as those for admission to the College of Business at USF Sarasota-Manatee:

1. Minimum of 60 semester hours of college credit earned.
2. Minimum of 2.75 overall GPA on all college-level work and a minimum of 2.00 on all credit attempted at USF, including any prior to academic renewal.

Graduation standards must meet those minimum standards of B.S. degrees in the College of Business as follows: 2.0 GPA overall. Graduation requirements are: 120 credit hours of coursework with at least 60 hours in business courses and a minimum of 54 hours in non-business courses. Students must earn a grade of C or higher and a minimum grade point average of 2.00 in all major and minor fields and

College foundation courses. All business students are required to select at least one course that deals with contemporary international topics.

- C. Describe the curricular framework for the proposed program, including number of credit hours and composition of required core courses, restricted electives, unrestricted electives, thesis requirements, and dissertation requirements. Identify the total numbers of semester credit hours for the degree.**

The total number of credit hours needed to complete the RMI degree is 120. The framework is as follows:

General Education Requirements – 36 hours. Courses must be complete in the five state-mandated subject areas: communications, mathematics, social sciences, natural sciences, and the humanities.

Business prerequisites – 21 hrs. In addition to general education requirements that all USF students must complete, the RMI program prerequisites are exactly the same as all of the other majors offered within the College of Business. These include the following state-mandated common prerequisites:

- ACG 2021 Principles of Financial Accounting
- ACG 2071 Principles of Managerial Accounting
- CGS 2100 Computers in Business
- ECO 2013 Macroeconomics
- ECO 2023 Microeconomics
- MAC 2233 Business Calculus
- STA 2023 Introductory Statistics I

Communication Requirements – 6 hrs. All business students must complete two required communication courses for a business major. They must complete SPC 2608 Public Speaking and either COM 3110 Communication for Business and the Professions or ENC 3250 Professional Writing.

Business Core Requirements – 21 hrs. All students in the College of Business are also required to take the following business foundation courses:

- BUL 3320 Law and Business I
- FIN 3403 Principles of Finance
- ISM 3011 Information Systems in Organizations
- QMB 3200 Business and Economic Statistics II
- MAN 3025 Principles of Management
- MAR 3023 Basic Marketing
- GEB 4890 Strategic Management and Decision Making

RMI Major Requirements – 15 hrs. All RMI majors are required to take the following courses:

- RMI 3011 Principles of Insurance
- RMI 4292 Property & Casualty Insurance Operations
- RMI 4115 Life & Health Insurance Products
- FIN 4303 Financial Institutions and Markets
- MAR 4841 Services Marketing

RMI Electives – 6 hrs. All RMI majors must complete two of the following courses:

- RMI 4941 Risk Management/Insurance Internship
- FIN 4504 Principles of Investments
- MAN 3240 Organizational Behavior
- MAN 4802 Entrepreneurship & Small Business Management
- MAR 3400 Professional Selling

D. Provide a sequenced course of study for all majors, concentrations, or areas of emphasis within the proposed program.

BS/BA in Risk Management/Insurance

Year 1

<i>Freshman Semester 1 (13 credit hours)</i>	<i>Freshman Semester 2 (15 credit hours)</i>
ENC 1101 Composition I (3) ^{GR} (Communications General Education)	ENC 1102 Composition II (3) ^{GR} (Communications General Education)
ECO 2013 Macroeconomics (3) ^{PR} (Social Sciences General Education)	ECO 2023 Microeconomics (3) ^{PR} (Social Sciences General Education)
Humanities General Education (3) ^{GR}	Humanities General Education (3) ^{GR}
SLS 1107 Foundations for University Success (1)	MAC 2233 Business Calculus (3) ^{GR PR} (Mathematics General Education)
Non-Business Elective (3)	CGS 2100 Computers in Business (or equiv.) (3) ^{PR}

Year 2

<i>Sophomore Semester 1 (15 credit hours)</i>	<i>Sophomore Semester 2 (17 credit hours)</i>
Natural Sciences General Education (3)	Natural Sciences General Education (3)
General Education Elective (3)	General Education Elective (3)
ACG 2021 Principles of Financial Accounting (3) ^{PR}	ACG 2071 Principles of Managerial Accounting (3) ^{PR}
STA 2023 Introductory Statistics or (QMB 2100, STA 2122) (3) ^{GR PR} (Mathematics General Education)	ENC 3250 Professional Writing OR ENC 3310 Expository Writing (3)
SPC 2608 Public Speaking (3) OR COM 3110 Communication for Business and the Professions (3)	SLS 2122 Foundations of Professional Success (2)
	Non-Business Elective (3)

Year 3

<i>Junior Semester 1 (15 credit hours)</i>	<i>Junior Semester 2 (15 credit hours)</i>
FIN 3403 Principles of Finance (3)	QMB 3200 Business & Economic Statistics II (3)
MAN 3025 Principles of Management (3) ^{PC} (Leadership and Ethics Pillar Course)	MAR 3023 Basic Marketing (3)
BUL 3320 Law and Business I (3)	FIN 4303 Financial Institutions and Markets (3)
ISM 3011 Information Systems in Organizations (3)	RMI 4292 Property & Casualty Insurance Operations (3)
RMI 3011 Principles of Insurance (3)	Community Engagement & Diversity Pillar Course (3) ^{PC}

Year 4

<i>Senior Semester 1 (15 credit hours)</i>	<i>Senior Semester 2 (15 credit hours)</i>
RMI 4115 Life & Health Insurance Products (3)	GEB 4890 Strategic Management and Decision Making (3) ^{PC} (Communication and Critical Thinking Pillar Course)
Non-Business Elective (3)	RMI Major Elective (3)
Business Elective (3)	RMI Major Elective (3)
Non-Business Elective (3)	Non-Business Elective (3)
MAR 4841 Services Marketing (3)	Elective (3)

- Total Credit Hours=120; Business Credit Hours = 60 min; Non-Business Credit Hours = 54 min
- Students are required to take 42 upper-level credit hours

- Students are required to take 9 credit hours in the summer, but are encouraged to accelerate the completion of their degree by taking additional summer credits
- GR = Gordon Rule Requirement (12 hrs. Communication, 6 hrs. Computation)
- PR = State-Mandated Common Prerequisites that are required for this degree
- PC = USF Sarasota-Manatee Pillar Course Requirements; Students are required to take 9 credit hours of pillar courses
- All students pursuing a BA degree must satisfy the college-level foreign language requirement.

E. Provide a one- or two-sentence description of each required or elective course.

Business Core Courses

BUL 3320 Law and Business I: This course covers the nature of legal and societal institutions and environments, and major aspects of public, private, UCC and related business law.

FIN 3403 Principles of Finance: Study of the processes, decision structures, and institutional arrangements concerned with the use and acquisition of funds by a firm. Includes the management of the asset and liability structure of the firm under certain and risky situations.

ISM 3011: An introduction to the language, concepts, structures and processes involved in the management of information systems including fundamentals of computer-based technology and the use of business-based software for support of managerial decisions.

MAN 3025 Principles of Management: Examines intrapersonal, interpersonal, group/team, organizational, and environmental (both stakeholder and societal) factors influencing the management task.

MAR 3023 Basic Marketing: Survey of the marketing of goods and services within the economy. Attention is paid to the impact of marketing on other functional areas of business as well as society.

QMB 3200 Business and Economic Statistics II: This course covers simple linear regression and correlation; multiple regression and model building; forecasting models; analysis of variance; chi-square tests; nonparametric methods.

GEB 4890 Strategic Management and Decision Making: This capstone course focuses on helping students develop a top-level executive perspective on managing a business, and requires students to integrate the theoretical and functional area concepts, principles, and skills learned in previous coursework.

Required RMI Courses

RMI 3011 Principles of Insurance: Identification of various types of risks; principles underlying selection of appropriate means of handling risks; introduction to life, health, property, liability and other area of insurance.

RMI 4292 Property & Casualty Insurance Operations: Analysis of insurer operations and the issues facing managers of such operations. Topics covered include regulation, accounting, finance, marketing, underwriting, reinsurance, ratemaking, and claims.

RMI 4115 Life & Health Insurance Products: This course provides an introduction to the life and health insurance side of the insurance industry. In the course, the term "Life Insurance" will be used in a broad context, including traditional life insurance, which pays on the death of the insured, but also examining annuities, which pay while an insured is still alive.

FIN 4303 Financial Institutions and Markets: A study of financial institutions and their roles in the capital markets; includes the savings allocation, investment, and financial decision making processes.

MAR 4841 Services Marketing: The course focuses on challenges facing service providers in developing, managing, promoting, and delivering quality service to customers.

Electives for RMI Majors

RMI 4941 Risk Management/Insurance Internship: This course is for those students who desire a career in Risk Management and Insurance. It will provide practical experience in the area.

FIN 4504 Principles of Investments: Survey of the risks and returns of investment media in relation to the investment objectives of individual and institutional investors. It includes an examination of the capital markets, information flows, and analytical techniques in terms of their impact on the valuation process.

MAN 3240 Organizational Behavior: The course covers research literature relevant to organizational functioning including behavioral effects of power and authority, formal organization, structural variation, leadership, motivation, and communication.

MAN 4802 Entrepreneurship & Small Business Management: Study of the factors involved in starting and managing a small- to medium-sized business. Emphasis is on conducting pre-business feasibility study, start-up of business, successful management of the firm, and options for succession or termination.

MAR 3400 Professional Selling: A study of the stages of the professional selling process, and the role of sales in today's marketing environment. Emphasis is on learning adaptive selling techniques and developing effective interpersonal communications skills.

- F. For degree programs in the science and technology disciplines, discuss how industry-driven competencies were identified and incorporated into the curriculum and indicate whether any industry advisory council exists to provide input for curriculum development and student assessment.**

Not Applicable.

- G. For all programs, list the specialized accreditation agencies and learned societies that would be concerned with the proposed program. Will the university seek accreditation for the program if it is available? If not, why? Provide a brief timeline for seeking accreditation, if appropriate.**

The College of Business at USF Sarasota-Manatee is accredited by AACSB. This program will be included in the AACSB accreditation and will undergo a full review by AACSB during the next Continuous Improvement Review cycle.

- H. For doctoral programs, list the accreditation agencies and learned societies that would be concerned with corresponding bachelor's or master's programs associated with the proposed program. Are the programs accredited? If not, why?**

Not Applicable.

- I. Briefly describe the anticipated delivery system for the proposed program (e.g., traditional delivery on main campus; traditional delivery at branch campuses or centers; or nontraditional delivery such as distance or distributed learning, self-paced instruction, or external degree programs). If the proposed delivery system will require specialized services or greater than normal financial support, include projected costs in Table 2 in Appendix A. Provide a narrative describing the feasibility of delivering the proposed program through collaboration with other universities, both public and private. Cite specific queries made of other institutions with respect to shared courses, distance/distributed learning technologies, and joint-use facilities for research or**

internships.

This program will be delivered using a combination of traditional, face-to-face courses and online courses.

IX. Faculty Participation

- A. Use Table 4 in Appendix A to identify existing and anticipated full-time (not visiting or adjunct) faculty who will participate in the proposed program through Year 5. Include (a) faculty code associated with the source of funding for the position; (b) name; (c) highest degree held; (d) academic discipline or specialization; (e) contract status (tenure, tenure-earning, or multi-year annual [MYA]); (f) contract length in months; and (g) percent of annual effort that will be directed toward the proposed program (instruction, advising, supervising internships and practica, and supervising thesis or dissertation hours).**

Table 4 is included in Appendix A.

- B. Use Table 2 in Appendix A to display the costs and associated funding resources for existing and anticipated full-time faculty (as identified in Table 4 in Appendix A). Costs for visiting and adjunct faculty should be included in the category of Other Personnel Services (OPS). Provide a narrative summarizing projected costs and funding sources.**

The Faculty Salaries and Benefits in Table 2 include three (3) current full-time faculty who teach courses that can be applied to the RMI major. Likewise, the salaries of adjuncts teaching RMI courses that can also be applied to other majors are included under Other Personal Services. The proportion of current full-time and adjunct salary included reflects anticipated RMI student enrollment in courses currently offered.

Year 1 cost per FTE is projected to be \$4,419 or \$147 per SCH, declining to \$3,553 or \$118 per SCH by Year 5. According to the FLBOG Direct Instruction Expenditures by Student Credit Hour report <http://www.flbog.edu/board/office/budget/expendanalysis.php>, the Year 1 cost is lower than the average cost posted for five of the twelve SUS universities and is nearly equal to the SUS average by Year 5.

- C. Provide in the appendices the abbreviated curriculum vitae (CV) for each existing faculty member (do not include information for visiting or adjunct faculty).**

CVs for current faculty have been added to Appendix C.

- D. Provide evidence that the academic unit(s) associated with this new degree have been productive in teaching, research, and service. Such evidence may include trends over time for average course load, FTE productivity, student HC in major or service courses, degrees granted, external funding attracted, as well as qualitative indicators of excellence.**

Most College of Business faculty teach either five or six courses per year. Pre-tenured faculty will teach four courses per year allowing them to devote adequate time to their research and publication. Over the past five years, these faculty members have published 96 articles in peer-reviewed journals. According to Google Scholar (May 16, 2017), 61 of the scholarly works published by the faculty between 2013 and 2017 have been cited at least once and these 61 works have been cited a total of 865 times. Overall, the College of Business faculty have produced more than 450 scholarly works that have collectively been cited more than 17,000 times. The faculty are all engaged in governance by serving on committees at both the College and University levels. Externally, many of the faculty serve their disciplines through their involvement with conferences and reviewing for journals. Faculty members have completed more than 200 peer reviews for journals over the past five years.

Student headcount in the College over the past five years is shown in the table below:

Enrollment	Fall 2012	Fall 2013	Fall 2014	Fall 2015	Fall 2016
Total Undergraduate	497	489	485	513	474
Accounting	137	127	135	119	94
Finance	51	47	31	59	50
General Business Administration	72	58	68	84	60
Management	56	63	58	40	39
Marketing	25	23	19	34	45
Pre-Business Administration	156	171	174	177	186
Master's Business Administration	44	36	25	69	88
Total COB	482	525	510	582	551

Graduation over the same five year period was as follows:

Degrees Awarded	2011-2012	2012-2013	2013-2014	2014-2015	2015-2016
Undergrad	171	156	139	153	138
MBA	19	18	17	16	15

X. Non-Faculty Resources

- A. Describe library resources currently available to implement and/or sustain the proposed program through Year 5. Provide the total number of volumes and serials available in this discipline and related fields. List major journals that are available to the university's students. Include a signed statement from the Library Director that this subsection and subsection B have been reviewed and approved.**

The USF Libraries has 94 journals for Actuarial Science, Insurance, and Risk Management. In addition there are 25 article databases and 33 Company & Industry databases to support the program. USF Libraries also 1,464 books on this subject, of which 1,235 are available online. In addition, students in this program will have access to 4,700 books from other libraries within the State University Library System. RMI students will also have access to Bloomberg Professional Services through the David Kotok/Cumberland Advisors Bloomberg Lab.

- B. Describe additional library resources that are needed to implement and/or sustain the program through Year 5. Include projected costs of additional library resources in Table 2 in Appendix A. Please include the signature of the Library Director in Appendix B.**

At this time based on the current resources available no additional resources will be necessary to implement and/or sustain the program through Year 5. No additional costs are projected for library resources.

- C. Describe classroom, teaching laboratory, research laboratory, office, and other types of space that are necessary and currently available to implement the proposed program through Year 5.**

Standard classroom space will be utilized to deliver the face-to-face courses. There is enough classroom space available to accommodate the program's needs.

- D. Describe additional classroom, teaching laboratory, research laboratory, office, and other space needed to implement and/or maintain the proposed program through Year 5. Include any projected Instruction and Research (I&R) costs of additional space in Table 2**

in Appendix A. Do not include costs for new construction because that information should be provided in response to X (E) below.

Office space will be available to accommodate one new RMI faculty.

- E. If a new capital expenditure for instructional or research space is required, indicate where this item appears on the university's fixed capital outlay priority list. Table 2 in Appendix A includes only Instruction and Research (I&R) costs. If non-I&R costs, such as indirect costs affecting libraries and student services, are expected to increase as a result of the program, describe and estimate those expenses in narrative form below. It is expected that high enrollment programs in particular would necessitate increased costs in non-I&R activities.**

There will be no new capital expenditure for instructional or research space required.

- F. Describe specialized equipment that is currently available to implement the proposed program through Year 5. Focus primarily on instructional and research requirements.**

There is no specialized equipment needed for this program.

- G. Describe additional specialized equipment that will be needed to implement and/or sustain the proposed program through Year 5. Include projected costs of additional equipment in Table 2 in Appendix A.**

There is no specialized equipment needed for this program.

- H. Describe any additional special categories of resources needed to implement the program through Year 5 (access to proprietary research facilities, specialized services, extended travel, etc.). Include projected costs of special resources in Table 2 in Appendix A.**

There are no special categories of resources needed for the RMI program.

- I. Describe fellowships, scholarships, and graduate assistantships to be allocated to the proposed program through Year 5. Include the projected costs in Table 2 in Appendix A.**

Industry sources have expressed interest in possible scholarship support for students in the RMI program. Scholarship programs will be developed as external funding is generated.

- J. Describe currently available sites for internship and practicum experiences, if appropriate to the program. Describe plans to seek additional sites in Years 1 through 5.**

Internships are currently available with many local insurance firms including FCCI, The Zenith, John Eastern Co., State Farm (George Quarterman), Bankers Life, and the Auto Club Group. Other firms have indicated that they will work with us to develop internship opportunities in the future.

APPENDIX A

**TABLE 1-A
PROJECTED HEADCOUNT FROM POTENTIAL SOURCES
(Baccalaureate Degree Program)**

Source of Students (Non-duplicated headcount in any given year)*	Year 1		Year 2		Year 3		Year 4		Year 5	
	HC	FTE	HC	FTE	HC	FTE	HC	FTE	HC	FTE
Upper-level students who are transferring from other majors within the university**	0	0	0	0	0	0	0	0	0	0
Students who initially entered the university as FTIC students and who are progressing from the lower to the upper level***	3	3	4	2.5	10	9.5	13	8.5	16	10
Florida College System transfers to the upper level***	21	15.75	24	18	27	20.25	32	24	37	27.75
Transfers to the upper level from other Florida colleges and universities***	5	3.75	6	4.5	7	5.25	8	6	10	7.5
Transfers from out of state colleges and universities***	1	0.5	1	0.5	1	0.5	2	1	2	1
Other (Explain)***	0	0	0	0	0	0	0	0	0	0
Totals	30	23	35	25.5	45	35.5	55	39.5	65	46.25

* List projected annual headcount of students enrolled in the degree program. List projected yearly cumulative ENROLLMENTS instead of admissions.

** If numbers appear in this category, they should go DOWN in later years.

*** Do not include individuals counted in any PRIOR CATEGORY in a given COLUMN.

APPENDIX A

**TABLE 2
PROJECTED COSTS AND FUNDING SOURCES**

Instruction & Research Costs (non-cumulative)	Year 1								Year 5						
	Funding Source							Subtotal columms 1+...+7	Funding Source						Subtotal columms 9+...+14
	Reallocated Base* (E&G)	Enrollment Growth (E&G)	New Recurring (E&G)	New Non-Recurring (E&G)	Contracts & Grants (C&G)	Philanthropy Endowments	Enterprise Auxiliary Funds		Continuing Base** (E&G)	New Enrollment Growth (E&G)	Other*** (E&G)	Contracts & Grants (C&G)	Philanthropy Endowments	Enterprise Auxiliary Funds	
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	
Faculty Salaries and Benefits	0	97,882	0	0	0	0	0	\$97,882	156,759	0	0	0	0	0	\$156,759
A & P Salaries and Benefits	0	0	0	0	0	0	0	\$0	0	0	0	0	0	0	\$0
USPS Salaries and Benefits	0	0	0	0	0	0	0	\$0	0	0	0	0	0	0	\$0
Other Personal Services	0	2,250	0	0	0	0	0	\$2,250	4,554	0	0	0	0	0	\$4,554
Assistantships & Fellowships	0	0	0	0	0	0	0	\$0	0	0	0	0	0	0	\$0
Library	0	0	0	0	0	0	0	\$0	0	0	0	0	0	0	\$0
Expenses	0	1,500	0	0	0	0	0	\$1,500	3,000	0	0	0	0	0	\$3,000
Operating Capital Outlay	0	0	0	0	0	0	0	\$0	0	0	0	0	0	0	\$0
Special Categories	0	0	0	0	0	0	0	\$0	0	0	0	0	0	0	\$0
Total Costs	\$0	\$101,632	\$0	\$0	\$0	\$0	\$0	\$101,632	\$164,313	\$0	\$0	\$0	\$0	\$0	\$164,313

*Identify reallocation sources in Table 3.

**Includes recurring E&G funded costs ("reallocated base," "enrollment growth," and "new recurring") from Years 1-4 that continue into Year 5.

***Identify if non-recurring.

Faculty and Staff Summary

Total Positions	Year 1	Year 5
Faculty (person-years)	0.42	1.26
A & P (FTE)	0	0
USPS (FTE)	0	0

Calculated Cost per Student FTE

	Year 1	Year 5
Total E&G Funding	\$101,632	\$164,313
Annual Student FTE	23	46.25
E&G Cost per FTE	\$4,419	\$3,553

**TABLE 3
ANTICIPATED REALLOCATION OF EDUCATION & GENERAL FUNDS***

Program and/or E&G account from which current funds will be reallocated during Year 1	Base before reallocation	Amount to be reallocated	Base after reallocation
	0	0	\$0
	0	0	
Totals	\$0	\$0	\$0
* If not reallocating funds, please submit a zeroed Table 3			

APPENDIX A

**TABLE 4
ANTICIPATED FACULTY PARTICIPATION**

Faculty Code	Faculty Name or "New Hire" Highest Degree Held Academic Discipline or Specialty	Rank	Contract Status	Initial Date for Participation in Program	Mos. Contract Year 1	FTE Year 1	% Effort for Prg. Year 1	PY Year 1	Mos. Contract Year 5	FTE Year 5	% Effort for Prg. Year 5	PY Year 5
A	Thomas Pencek, Ph.D. Finance	Instructor II	MYA	Fall 2018	9	0.75	0.02	0.02	9	0.75	0.09	0.07
A	Lisa Penney, Ph.D. Management	Associate Professor	Tenured	Fall 2018	9	0.75	0.02	0.02	9	0.75	0.03	0.02
A	Kelly Cowart, Ph.D. Management	Assistant Professor	Tenure Earning	Spring 2019	9	0.75	0.02	0.02	9	0.75	0.06	0.05
C	New Hire, Ph.D. Risk Management	TBD	T/TE	Fall 2018	9	0.75	0.50	0.38	9	0.75	0.50	0.38
C	New Hire, Ph.D. Risk Management	TBD	TBD	Fall 2020	9	0.75	0.00	0.00	9	0.75	0.25	0.19
Total Person-Years (PY)								0.42				0.70

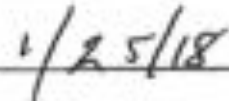
Faculty Code		Source of Funding	PY Workload by Budget Classification	
			Year 1	Year 5
A	Existing faculty on a regular line	Current Education & General Revenue	0.05	0.70
B	New faculty to be hired on a vacant line	Current Education & General Revenue	0.38	0.00
C	New faculty to be hired on a new line	New Education & General Revenue	0.00	0.56
D	Existing faculty hired on contracts/grants	Contracts/Grants	0.00	0.00
E	New faculty to be hired on contracts/grants	Contracts/Grants	0.00	0.00
Overall Totals for			Year 1 0.42	Year 5 1.26

APPENDIX B


Please include the signature of the Equal Opportunity Officer and the Library Director.



Signature of Equal Opportunity Officer



Date



Signature of Library Director



Date

This appendix was created to facilitate the collection of signatures in support of the proposal. Signatures in this section illustrate that the Equal Opportunity Officer has reviewed section III.E of the proposal and the Library Director has reviewed sections X.A and X.B.

APPENDIX C (Faculty Abbreviated CVs)

Curriculum vitae (abbreviated)

Thomas Edwin Becker

Present Position: Professor, Management, University of South Florida Sarasota-Manatee,
Sarasota, FL 34243

Phone: (941) 359-4245

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EDUCATION

Ph.D. The Ohio State University, Columbus, Ohio, December 1990
Department of Industrial and Organizational Psychology
M.A. The Ohio State University, March 1988
Department of Industrial and Organizational Psychology
B.A. University of South Florida, Tampa, Florida, June 1982
Department of Psychology
Summa cum Laude

GRANTS FOR RESEARCH

\$120,000 German Science Foundation, 2009-2010
\$75,000 Belgian Franqui Foundation, 2002-2003
\$190,000 Army Research Institute, 1993-1995

AWARDS/HONORS

- Social Science Citation Index citation award, top 1% of economics and business
- Editor's distinction for *Organizational Research Methods* (#2 on the Top 10 list of all-time most noteworthy manuscripts)
- Certificate of Recognition for Excellence in Teaching, Spring, 2016
- University Excellence in Teaching Award, 2013
- Mercator Fellowship, German Science Foundation, Johann Wolfgang Goethe University, Frankfurt, Germany, 2010
- Associate Editor of *Human Performance*, 2008-2011
- Belgian International Francqui Chair in the Human Sciences, 2003
- CBE Continuing Excellence in Research Beyond Tenure Award, 1998
- Department of Management and Systems Advising Excellence Award, 1995
- Seafirst Distinguished Faculty Award, 1993
- Shell Instructional Excellence Award, 1992

PUBLICATIONS

1. Gonzalez-Morales, M. G., Kernan, M. C., Becker, T. E., & Eisenberger, R. (in press). Defeating abusive supervision: Training supervisors to support subordinates. *Journal of Occupational Health Psychology*.
2. Becker, T. E. (2016). Multiple foci of workplace commitments. In J. P. Meyer, *The handbook of employee commitment*. Northampton, MA: Elgar Publishing.
3. Becker, T. E., & Ferry, D. (2016). Profiles as a way of learning more about resilience (2016). *Industrial and Organizational Psychology: Perspectives on Science and Practice*, 9, 503-508.
4. Becker, T. E., Atinc, G., Breugh, J. A., Carlson, K. D., Edwards, J. R., & Spector, P. E. (2016). Statistical control in correlational studies: Ten essential recommendations for organizational researchers. *Journal of Organizational Behavior*, 37, 157-167.
5. Becker, T. E., Kernan, M. C., Clark, K. C., & Klein, H. K. (2015, online). Dual commitments to organizations and professions: Different motivational pathways to productivity. *Journal of Management*, DOI: 10.1177/0149206315602532
<http://jom.sagepub.com/content/early/2015/09/02/0149206315602532.full.pdf+html>
6. Becker, T. E., & Marique, G. (2014). Observer effects without demand characteristics: An inductive investigation of video monitoring and performance. *Journal of Business and Psychology*, 29, 541-553.
7. Becker, T. E., Ullrich, J., & Van Dick, R. (2013). Within-person variation in employee commitment: Where it comes from and why it matters. *Human Resource Management Review*, 23, 131-147. [Lead article of a special issue on advances in understanding workplace commitments.]
8. Becker, T. E. (2012). Nepotism and the commitment of relevant parties. In R. G. Jones (Ed.), *Understanding and adapting to organizational nepotism* (pp. 129-145). New York: Routledge.
9. Eisenberger, R., Karagonlar, G., Stinghamber, F., Neves, P., Becker, T. E., GonzalezMorales, M. G., & Steiger-Mueller, M. (2010). Leader-member exchange and affective organizational commitment: The contribution of supervisor's organizational embodiment. *Journal of Applied Psychology*, 95, 1085-1103.
10. Klein, H. J., Becker, T. E., & Meyer, J. P. (Eds.). (2009). *Commitment in organizations: Accumulated wisdom and new directions*. New York: Routledge.
 - (a) Becker, T. E. (2009). Interpersonal commitments. In H. J. Klein, T. E. Becker, & J. P. Meyer (Eds.), *Commitment in organizations: Accumulated wisdom and new directions* (pp. 137-178). New York: Routledge.
 - (b) Becker, T. E., Klein, H. J., & Meyer, J. P. (2009). Commitment in organizations: Accumulated wisdom and new directions. In H. J. Klein, T. E. Becker, & J. P. Meyer (Eds.), *Commitment in organizations: Accumulated wisdom and new directions* (pp. 419-452). New York: Routledge.
11. Jeffries, F. J., & Becker, T. E. (2008). Trust, norms, and cooperation: Development and test of a simplified model. *Journal of Behavioral and Applied Management*, 9, 316-336. [Selected for the editor's 2008 best paper of the year award.]
12. Becker, T. E., & Bennett, R. (2007). Employee attachment and deviance in organizations. In J. Langan-Fox, C. Cooper, and R. Klimoski (Eds.), *Research companion to the dysfunctional workplace: Management challenges and symptoms* (pp. 136-151). Northampton, MA: Elgar.
13. Meyer, J. P., Becker, T. E., & Van Dick, R. (2006). Social identities and commitments at work: Toward an integrative model. *Journal of Organizational Behavior*, 27, 665-683.
14. Van Dick, R., Becker, T. E., & Meyer, J. P. (2006). Commitment and identification: Forms, foci, and future. Introduction and overview. *Journal of Organizational Behavior*, 27, 545-548. (Editors' introduction to a special issue.)
15. Becker, T. E. (2005). Potential problems in the statistical control of variables in organizational research: A qualitative analysis with recommendations. *Organizational Research Methods*, 8, 274-

289. [Chosen by *ORM's* editor as #2 on the Top 10 list of the journal's all-time "most noteworthy manuscripts."]
16. Aquino, K., & Becker, T. E. (2005). Lying at work: How individual and situational factors influence the use of neutralization strategies. *Journal of Organizational Behavior, 26*, 661-679.
 17. Becker, T. E. (2005). Development and validation of a situational judgment test of employee integrity. *International Journal of Selection and Assessment, 13*, 225-232.
 18. Becker, T. E. (2005). Changing places in a small world: An American in Brussels. *The Industrial-Organizational Psychologist, 42*, 101-105.
 19. Meyer, J. P., Becker, T. E., & Vandenberghe, C. (2004). Employee commitment and motivation: A conceptual analysis and integrative model. *Journal of Applied Psychology, 89*, 991-1007.
 20. Becker, T. E. (2004). Why pragmatism is not practical. *Journal of Management Inquiry, 13*, 224-228.
 21. Becker, T. E. (2004). Review of the book Postmodernism and management: Pros, cons, and the alternative. *Personnel Psychology, 57*, 783-786.
 22. Becker, T. E., & Kernan, M. C. (2003). Matching commitment to supervisors and organizations to in-role and extra-role performance. *Human Performance, 16*, 327-348.
 23. Becker, T. E. (2003). Is emotional intelligence a viable concept? *Academy of Management Review (Dialogue), 28*, 192-196.
 24. Becker, T. E. (2002). A mostly informal analysis of our marketplace of ideas. *The Industrial – Organizational Psychologist, 40*, 77-84.
 25. Gopinath, C., & Becker, T. E. (2000). Communication, procedural justice, and employee attitudes: Relationships under conditions of divestiture. *Journal of Management, 26*, 6383.
 26. Becker, T. E. (1998). Integrity in organizations: Beyond honesty and conscientiousness. *Academy of Management Review, 23*, 154-161.
 27. Locke, E. A., & Becker, T. E. (1998). Rebuttal to a subjectivist critique of an Objectivist approach to integrity in organizations. *Academy of Management Review, 23*, 170-175.
 28. Locke, E. A., & Becker, T. E. (1998). Locke and Becker's reply to Weiss. *Academy of Management Review (Dialogue), 23*, 391-392.
 29. Locke, E. A., & Becker, T. E. (1998). Objectivism's answer to the sad, old world of skepticism. *Academy of Management Review (Dialogue), 23*, 658-659.
 30. Becker, T. E., Billings, R. S., Eveleth, D. M., & Gilbert, N. W. (1997). Validity of three attachment style scales: Exploratory and confirmatory evidence. *Educational and Psychological Measurement, 57*, 477-493.
 31. Becker, T. E., Billings, R. S., Eveleth, D. M., & Gilbert, N. W. (1996). Foci and bases of commitment: Implications for performance. *Academy of Management Journal, 39*, 464-482.
 32. Becker, T. E., & Martin, S. L. (1995). Trying to look bad at work: Methods and motives for managing poor impressions in organizations. *Academy of Management Journal, 38*, 174-199. (Note: Summaries of this article were published in the July-August 1995 issue of the *Harvard Business Review* and the August 1995 issue of the *Academy of Management Executive*.)
 33. Becker, T. E., Randall, D. M., & Riegel, C. D. (1995). The multidimensional view of commitment and the theory of reasoned action: A comparative evaluation. *Journal of Management, 21*, 617-638.
 34. Becker, T. E., & Eveleth, D. M. (1995, August). Foci and bases of employee commitment: Implications for job performance. *Best Paper Proceedings of the 1995 Academy of Management Meetings, Vancouver, B.C.*
 35. Becker, T. E., & Cote, J. A. (1994). Additive and multiplicative method effects in applied psychological research: An empirical assessment of three models. *Journal of Management, 20*, 625-641.

36. Becker, T. E., & Randall, D. M. (1994). Validation of a measure of organizational citizenship behavior against an objective behavioral criterion. *Educational and Psychological Measurement*, 54, 160-167.
37. Becker, T. E., & Billings, R. S. (1993). Profiles of commitment: An empirical test. *Journal of Organizational Behavior*, 14, 177-190.
38. Becker, T. E., & Vance, R. J. (1993). Construct validity of three types of organizational citizenship behavior: An illustration of the direct product model with refinements. *Journal of Management*, 19, 663-682.
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40. Becker, T. E., & Colquitt, A. L. (1992). Potential versus actual faking of a biodata form: An analysis along several dimensions of item type. *Personnel Psychology*, 45, 389-406.
41. Becker, T. E., & Klimoski, R. J. (1989). A field study of the relationship between the organizational feedback environment and performance. *Personnel Psychology*, 42, 343-358.
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43. Becker, T. E., & Sexton, D. L. (1989, June). The entrepreneurial spirit as a profile of commitment: An explication of the propensity for growth. In B. Garnier, G. d'Amboise, & Y. Gasse (Eds.), *Proceedings of the 34th World Conference of the International Council for Small Business*, Quebec.

Curriculum vitae (abbreviated)

Kelly Cowart

Present Position: Assistant Professor, Marketing, University of South Florida Sarasota-Manatee,
Sarasota, FL 34243

Phone: (941) 359-4576
E-mail: cowartk@sar.usf.edu

EDUCATION

PhD (2010), Florida State University, Tallahassee, FL; Major: Marketing; Secondary Area: Social Psychology
MBA Syracuse University, Syracuse, NY; Major: Organizational Behavior
BA Business Administration, University of Florida, Gainesville, FL; Major: Business Management

AWARDS/HONORS

Professor of the Year Award – TRIO Student Support Organization (2016)
Class experiential learning project featured on GVNOW & GVSU Lanthorn (2015 & 2016)
University Distinguished Early-Career Award nominee (2014)
Research findings featured in five regional media outlets (2014)
Research findings featured on GVNOW Faculty Spotlight – GVSU webpage (2014)
Best Working Paper Award – Association of Consumer Research (2013) Favorite
Professor Recognition - ΒΓΣ International Honor Society (2013) McKnight
Doctoral Fellow (2005 - 2010)
Ph.D. Project Fellow (2005 - 2010)
Dissertation Research Grant, Florida State University Graduate School
(2008 - 2009) College of Business Teaching Excellence Award, Florida
State University (2008) National Summer Institute Fellow, University of
Denver (2008)
Russell V. Ewald Award for Excellence & Human Services
(2008) AMS Sheth Foundation MDSA Conference Fellow
(2006 - 2008)
American Marketing Association Foundation Valuing Diversity
Scholarship (2007) National Black MBA Association H. Naylor Fitzhugh
Scholarship (2007)

PUBLICATIONS

Pelet, J., Ettis, S. Cowart, K. (forthcoming) “Optimal Experience of Flow Enhanced by Telepresence: Evidence from Social Media Use,” *International Journal of Information and Management*.
Kemp, E., Moore, David J., Cowart, K. (2016) “Me, Myself and I: Examining the Effect of Loneliness and Self-focus on Message Referents,” *Journal of Current Issues & Research in Advertising*.
Cowart, K., Brady, M. (2014) “Pleasantly Plump: Managing the Negative Effects of Obesity

Stereotypes on Customer Evaluations of Frontline Service Employees," *Journal of Retailing*, 90(3), 365-378.

Swilley, E., Cowart, K., Flynn, L. (2014) "An Examination of Regifting: A Look at the Behaviors Behind This Gift-Giving Phenomenon," *Journal of Consumer Behaviour*, 13(4), 251-261.

Cowart, K., Ramirez, E., Brady, M. (2014). "Religious Affiliation: Buffering Negative Reactions to Service Failures," *Journal of Services Marketing*, Vol. 28(1).

Cowart, K., Darke, P. (March 2014). "Targeting Miss Daisy: Using Age and Gender to Target Unethical Sales Tactics" *Marketing Letters*, Vol. 25(1), 67-75.

2

Cowart, K., Fox, G., Wilson, A. (2008). "A Structural Look at Consumer Innovativeness and Self Congruence in New Product Purchases," *Psychology & Marketing*, Vol. 25(12), pp. 1111-1130.

Cowart, K., Goldsmith, R. (2007). "Influence of Consumer Decision Making Styles on Online Fashion Consumption of College Students," *International Journal of Consumer Studies*, Vol. 31(6), pp. 639- 647.

Curriculum vitae (abbreviated)

JAMEY AUSTIN DARNELL

Present Position: Visiting Instructor, Management, University of South Florida Sarasota-Manatee,
Sarasota, FL 34243

Phone: (941) 359-4647

E-mail: darnellj@sar.usf.edu

EDUCATION

- D.B.A. Doctor of Business Administration: University of Florida, Gainesville, FL. 2017 AACSB & regionally accredited. Ph.D. course work – 27 credit hours in Management (Organizational Behavior). Virginia Commonwealth University, Richmond, VA 2007-2008. AACSB & regionally accredited. Dissertation: Corporate Social Responsibility and Firm Reputation Risk: Bettering Firm Reputational Risk through Socially Responsible Activities.
- M.B.A. Thunderbird, School of Global Management, Glendale, AZ. International Management, 1999. AACSB & regionally accredited.
- B.S. Pepperdine University, Malibu, CA. International Business, 1998. AACSB & regionally accredited.

AWARDS/HONORS

- International Management syllabus recognized by McGraw-Hill as an exemplar to accompany *Global Business Today* by Hill & Hult.
- Endowed Chairs for Excellence at the College of Central Florida: the Mr. and Mrs. Seymour B. Robinson Endowed Chair (grant to develop Experiential Entrepreneurship Education 2015-2016).
- UF Graduate Grant 2014, 2015
- Southern Management Association Doctoral Consortium Travel Stipend 2007.
- VCU Graduate School Scholarship 2007/2008
- Indiana Department of Workforce Development Grant (to develop a training program for new frontline managers) 2004.
- Best Educator nominee, Kokomo Tribune 2004.
- Thunderbird Grant 1999.

PUBLICATIONS

- Darnell, J. A. (2017). The Experiential Exercise about Nothing: using comedy to teach creativity. *Experiential Entrepreneurship Exercises Journal*, 2(S1), 30-35.
- Darnell, J. A. & Means, T. S. (2017, forthcoming). What do People, Prototyping, Problem Solving, and Play-Doh have in Common? Team-based Learning! *American Journal of Management*, 17(2).
- Darnell, J. A. & Rahn, D. R. (2017, forthcoming). E-business for Entrepreneurs: a turnkey experiential based course for teaching faculty. *Journal of Higher Education Theory & Practice*, 17(5).
- Darnell, J. A., Darnell, M. R., & Means, T. S. (2017, forthcoming). Resistance is Futile: using Team Based Learning (TBL) to teach change and create an Idea Champion collective. *American Journal of Management*, 17(3).

Curriculum vitae (abbreviated)

Thomas Pencek

Present Position: Instructor II - Finance
University of South Florida-Sarasota-Manatee, Sarasota, FL 34243

Phone: (941) 359-4631
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EDUCATION

D.B.A. (1988) Mississippi State University, Mississippi State, Mississippi. (Major-Finance, Minors-Accounting and Quantitative) Dissertation Topic - A Comparison of Relative Efficiency Measures of the Major United States Stock Exchanges.

M.B.A. (1982) Mississippi State University, Mississippi State, Mississippi.

B.S. (1977) (Business Administration/Accounting) SUC at Fredonia, Fredonia, New York.

AWARDS/HONORS

Outstanding Professor Award by graduating seniors, USF/Sarasota-Manatee (Fall 2008) Faculty Representative to Faculty Governance Association USF/Sarasota-Manatee
MBA Professor of Year 2003-2004 Meredith College
International Academy for Information Management (Board of Directors, Vice President 2000-2005)
Beta Gamma Sigma
Decision Sciences Institute
Delta Mu Delta
Financial Management Association
Midsouth Academy of Economics and Finance
Midwest Finance Association
Northeast Business and Economics Association
Academy of Financial Services
Omicron Delta Epsilon

PUBLICATIONS

"Excess Returns in Hospitality Stocks," with K. Annaraud and D. Singh, Journal of Tourism and Hospitality Management, Accepted for publication in 2017.

"Sunrise Golf Club" with K. Annaraud, Journal of Hospitality and Tourism Cases, 2015.

"Predicting First-Year Returns of Health Care IPOs," with R. Borghesi, Journal of Applied Business Research, May/June 2013, Vol. 29, NO. 3.

"The Value of Smart Money Stock Recommendations," with R. Borghesi, Applied Economics Letters, July 2011, Vol. 18, Issue 10.

"The (Non) Performance of *Kiplinger's* Expert Recommendations" with R. Borghesi, Journal of Applied Business Research (July/August 2010).

Stock Market Performance of Health Initial Public Offering, with Neset Hikmet and J. Barry Lin, Journal of Business and Economic Studies (Fall 2009)

"An Application of Active Learning and Distance Education," with D. Bialaszewski, e-book of Informing Sciences, 2001.

"A Description of the Finance Requirements and Computer Utilization at AACSB-Accredited

Schools," with Dennis Bialaszewski and John Zeitlow, Financial Practice and Education, Spring 1994.

"A Comparison of Market Efficiency of the Major U.S. Stock Exchanges," with Theodor Kohers, American Business Review, June 1990.

"An Investigation Into the Market Efficiency of the American Stock Exchange," with Theodor Kohers, Business and Economic Review, Summer 1988.

Curriculum vitae (abbreviated)

Lisa M. Penney

Present Position: Associate Professor – Management, University of South Florida Sarasota-Manatee, Sarasota, FL 34243

Phone: (941) 359-4653

E-mail: lpenney@sar.usf.edu

EDUCATION

Ph.D. Industrial-Organizational Psychology, University of South Florida, 2003

Dissertation: Workplace incivility and counterproductive work behavior (CWB): What is the relationship and does personality play a role? Chair: Paul E. Spector

M.A. Industrial-Organizational Psychology, University of South Florida, 1999 Thesis:

Antisocial workplace behavior and self-esteem: An examination of the relationship between egotism and aggressive and antisocial behavior. Chair: Paul E. Spector

B.A. Psychology, University of South Florida, 1996, Magna Cum-Laude

GRANTS for RESEARCH

\$3,300,000 Increasing the Participation and Advancement of Women in Academic Science and Engineering Careers (ADVANCE). (NSF 12-584) PI: Renu Khator (Chancellor, UH). Co-PIs: Tedesco, J. (Dean, College of Engineering), Wells, D. (Dean, College of Natural Sciences and Mathematics), Dunbar, B. (Professor, Engineering), & Hutchins, H. (Associate Professor, HR Development).
Role: L. M. Penney & L. A. Witt (Co-Investigators) ADVANCE Social Science Research Initiative: *Organizational Climate as a Faculty Resource: A Multi-Dimensional, Latent Variable, Multi-Level Investigation*. Funded for August 2014-July 2019.

\$20,603 National Institutes of Justice (NIJ) via the Southwest Public Safety Technology Center (SWTC), 2007. Violence, Aggression and Law Enforcement Officer Performance: Do Formal and Informal Support Systems Mitigate the Negative Impact of Experienced Aggression on Officer Performance? Funded for Jan. 15, 2008 – Sept. 30, 2008.

\$6,000 New Faculty Research Grant, University of Houston, 2005. Identifying motives for employee counterproductive behavior.

AWARDS/HONORS

2014 Recognized by Routledge for having one of the most downloaded articles published in Routledge Behavioral Sciences journals in 2014 for Hunter & Penney (2014) article in *Human Performance*.

- 2013 Nominated for the Ross M. Lence Teaching Excellence Award, College of Liberal Arts and Social Sciences, University of Houston.
- 2012 Nominated for the Ross M. Lence Teaching Excellence Award, College of Liberal Arts and Social Sciences, University of Houston.
- 2011 Recognized by Elsevier for having one of the 10 most cited papers of the last 5 years by the *Journal of Vocational Behavior*.
- 2008 Recognized for presenting one of the top posters at the 2008 SIOP Conference.
- 2008 Recognized for presenting one of the top papers at the 2008 Academy of Management Meeting, Entrepreneurship Division.

PUBLICATIONS

* INDICATES CURRENT OR FORMER STUDENT.

1. Hutchins, H. M., **Penney, L. M.**, & *Sublett, L. W. (In press). What imposters risk at work: Exploring imposter phenomenon, coping, and job outcomes. *Human Resource Development Quarterly*.
2. Messa, E. A, Horn, C. L., Longacre, T., Olenchak, F. R., & **Penney, L. M.** (2016). A case for competencies: Assessing the value of trait-based performance appraisal for nonfaculty university employees. *Education Policy Analysis Archives*, 24(51). <http://dx.doi.org/10.14507/epaa.v24.2212>
3. *Shoss, M. K., *Hunter, E. M., & **Penney, L. M.** (2016). Avoiding the issue: Disengagement coping style and the personality-CWB link. *Human Performance*, 29(2), p.106-122. DOI:10.1080/08959285.2016.1148036
4. *Hunter, E., & **Penney, L. M.** (2014). The Waiter Spit in my Soup! Antecedents of Customer-Directed Counterproductive Work Behavior. *Human Performance*, 27, 262-281.
doi: 10.1080/08959285.2014.913595
****Recognized as one of the most downloaded articles published in Routledge Behavioral Sciences journals in 2014.**
5. *Hunter, E. M., Neubert, M. J., *Perry, S. J., Witt, L. A., **Penney, L. M.**, & Weinberger, E. L. (2013). Servant leaders inspire servant followers: Outcomes for employees and the organization. *Leadership Quarterly*, 24, 316-331. doi: 10.1016/j.leaqua.2012.12.001
****Recognized as one of the 5 most highly cited articles in *Leadership Quarterly* from 2014-2016.**
6. *Shoss, M., & **Penney, L. M.** (2012). The economy and absenteeism: A macro-level study. *Journal of Applied Psychology*, 97(4), 881-889 doi:10.1037/a0026953.
7. Ilie, A., **Penney, L. M.**, Ispas, D., & Ilescu, D. (2012). The role of anger in the relationship between stressors and counterproductive work behaviors: Convergent findings from multiple studies and methodologies. *Applied Psychology: An International Review*, 61(3), 415-436.

8. **Penney, L. M.,** *David, E., & Witt, L. A. (2011). A review of personality and performance: Identifying boundaries, contingencies, and future research directions. *Human Resource Management Review, 21*, 297-310. doi:10.1016/j.hrmr.2010.10.005
9. **Penney, L. M.,** *Hunter, E. M., & *Perry, S. J. (2011). Personality and CWB: Using Conservation of Resources Theory to narrow the profile of deviant employees. *Journal of Occupational and Organizational Psychology, 84*, 58-77. doi:10.1111/j.2044-8325.2010.02007.x
10. *Perry, S. J., Witt, L. A. **Penney, L. M.,** & Atwater, L. (2010). The downside of goalfocused leadership: The role of personality in subordinate exhaustion. *Journal of Applied Psychology, 95*, 1145-1153. doi: 10.1037/a0020538
11. Kessler, S. R., Bandelli, A. C., Spector, P. E., Borman, W. E., Nelson, C. E., & **Penney, L. M.** (2010). Reexamining Machiavelli: A three dimensional model of Machiavellianism in the workplace. *Journal of Applied Social Psychology, 40*(8), 1868-1896.
12. *Krischer, M., **Penney, L. M.,** & *Hunter, E. (2010). Can counterproductive work behaviors be productive? CWB as emotion-focused coping. *Journal of Occupational Health Psychology, 15*(2), 154-166. doi: 10.1037/a0018349
****Also featured in *Academy of Management Perspectives*, August 2010 issue.**
13. *Milam, A., Spitzmuller, C., & **Penney, L. M.** (2009). Individual differences and perceptions of workplace incivility. *Journal of Occupational Health Psychology, 14*(1), 58-69.
doi: 10.1037/a0012683
14. Spector, P. E., Fox, S., **Penney, L. M.,** Bruursema, K., Goh, A., & Kessler, S. (2006). The dimensionality of counterproductivity: Are all counterproductive behaviors created equal? *Journal of Vocational Behavior, 68*, 446-460. doi:10.1016/j.jvb.2005.10.005
****In 2011 Elsevier noted as one of top 10 cited over the prior 5 years in the journal.**
15. **Penney, L. M.,** & Spector, P. E. (2005). Job stress, incivility, and counterproductive workplace behavior (CWB): The moderating role of negative affectivity. *Journal of Organizational Behavior, 26*(5), 777-796. doi: 10.1002/job.336
16. **Penney, L. M.** & Spector, P. E. (2002). Narcissism and counterproductive behavior: Do bigger egos mean bigger problems? *International Journal of Selection and Assessment, 10*(1), 126-134.

Board of Governors, State University System of Florida
 Request Form: Limited Access Status for an Academic Program
 In Accordance with BOG Regulations
 6.001 - General Admissions and 8.013 - Limited Access

University:	University South Florida Sarasota-Manatee	Degree(s) offered:	Bachelor of Science
Program:	Risk Management/Insurance	Six digit CIP code:	52.1701

1. Will the entire program be limited access or only a specific track?
 The Risk Management/Insurance program (RMI) is a proposed new undergraduate degree program within the USF Sarasota-Manatee College of Business and, as is the case with the other undergraduate degree programs in the College, the entire program would be limited access.

2. If only one track is limited access, please specify the name of the track?
 N/A

3. Please specify:
 The total number of new students anticipated to enroll in the program each academic year:
 Year 1: 30; Year 2: 5; Year 3: 10; Year 4: 10; Year 5: 10

 The total number of students anticipated to enroll in the program each academic year:
 Year 1: 30; Year 2: 35; Year 3: 45; Year 4: 55; Year 5: 65

4. When do you propose to initiate limited access? (please specify the effective term and year)
 Fall 2018, when the new degree program is expected to be approved to offer.

5. What is the justification for limiting access?
 RMI is being proposed as a new undergraduate degree program within the College of Business. USF Sarasota-Manatee's College of Business is accredited by AACSB. The College of Business faculty have determined that increased admission standards are necessary for maintaining the standards established in meeting AACSB accreditation requirements. The current degree programs under the scope of AACSB accreditation (Accounting, Finance, Management, and Marketing) have previously been approved for limited access. During the next AACSB Continuous Improvement Review (CIR), RMI will be included in the scope of AACSB accreditation. Therefore, limiting access to the RMI program is justified.

6. By what means will access be limited? Please provide a description of the program's admissions requirements and procedures. Additionally, please indicate how these requirements and procedures ensure equal access for Florida College System Associate of Arts degree graduates in competing for available space in the program.

The College of Business is an upper-level, limited access college, which means that it has

admissions requirements in addition to those of the University in general, including:

- a. Minimum of 60 semester hours of college credit earned.
- b. Minimum of 2.75 overall grade-point average (GPA) on all college-level coursework and a minimum of 2.00 on all credits attempted at USF, including any prior to academic renewal.
- c. In computing entry GPA, all business and economics courses taken for S or U grades will be converted to C or F, respectively.
- d. Successful completion of the following State Mandated Common Prerequisites (or equivalents):
 - ACG 2021 Principles of Financial Accounting
 - ACG 2071 Principles of Managerial Accounting
 - CGS 2100 Computers in Business
 - ECO 2013 Macroeconomics
 - ECO 2023 Microeconomics
 - MAC 2233 Business Calculus
 - STA 2023 Introductory Statistics I

Florida College System Associate of Arts degree graduates typically complete the general education requirements and the State Mandated Common Prerequisites at their state college. Therefore, they should experience no negative impact to their admission to the RMI program in meeting the admissions standards.

7. Present the current race and gender profiles of the students in the program. Discuss the impact of the proposed action on the race and gender profiles and cite sources used to inform the discussion. What strategies, should they be necessary, will be used to promote diversity in the program?

As this is a newly proposed degree program, no students are currently enrolled. Provided below, however, is the race and gender profiles of the existing degree programs in the College of Business with limited access.

Ethnicity	% of Total	Total Student	Female	Male
American Indian	0.2%	1	1	0
Asian	2.4%	12	10	2
Black	2.6%	13	5	8
Hispanic	15.7%	77	36	41
Non-Resident Alien	1.8%	9	5	4
Not-Reported	2.2%	11	6	5
Two or More Race	2.9%	14	5	9
White	72.1%	354	182	172
Grand Total	100.0%	491	250	241

USF Sarasota-Manatee is committed to attracting and retaining a diverse student body and the steps taken to recruit for all programs will be used for the RMI program as well. Some of those steps are as follows:

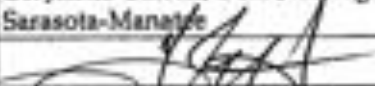

- Admissions uses a Customer Relationship Management (CRM) System to manage prospective student information and to execute a communication plan consisting of mail, email, and phone call campaigns. Communications are in place to reach and attract

diverse student body. Some examples include sharing profiles and testimonials of current students and alumni who are from underrepresented populations.

- USF Sarasota-Manatee has an Admissions Counselor for Diversity Recruitment and with responsibility for developing relationships with community partners, like Upward Bound programs, College Reach Out programs, Take Stock in Children, Boys and Girls Club, Y Achievers, and other community groups. She will also assist with communication to these partners about what USF Sarasota-Manatee has to offer and assisting them with setting up special group visits to campus.
- USF Sarasota-Manatee has a Bilingual Spanish Speaking Admissions Counselor to work with Hispanic students and their families on the admissions process.
- Representatives attend college fairs in the local market as well as visiting local high schools to give presentations and provide information on USF Sarasota-Manatee and its academic programs.
- Admissions representatives meet with prospective students at their high schools for instant decision days in the fall and offer on the spot acceptance to qualified students. Students who do not meet admissions requirements at that time are given guidance on what they can do to strengthen their application.
- Admissions purchases contact information of high school students who take the ACT and/or SAT to then communicate with them about USF Sarasota-Manatee and its academic programs. They are then able to target students by demographics and geographic locations.
- Admissions hosts open house programs, information sessions, and other events on campus for all potential students.
- USF Sarasota-Manatee representatives visit local state college and community colleges to attend events, set up information tables, or to speak to classrooms of students.
- The FUSE program at the State College of Florida is in place to co-advise SCF students on their courses based on their intended major at USF Sarasota-Manatee and to provide them with opportunities to participate in USF Sarasota-Manatee student life activities and events.

8. Are the graduates of the program in high demand? If so, and if the program is to be limited due to lack of adequate resources, provide a justification for limiting access to the program rather than reallocating resources from programs with low market demand.

The graduates of the program are in high demand. However, the program is not being limited due to lack of adequate resources.

Request Initiated by:	Dr. James Curran, Dean, College of Business, USF Sarasota-Manatee
EEO Officer's Signature:	
Provost's Signature:	
University Board of Trustees Approval Date (please include a copy of the UBOT agenda with this form)	

USF Board of Trustees (March 6, 2018)

Issue: Oversight of the University Direct Support Organizations ("DSO")

Proposed action: Recommend to the Board the Attached Amendments to USF System Regulation 13.002

Executive Summary:

The proposed changes were originally presented to the Governance Committee as information items at the August 17, 2017 meeting. The changes to Regulation 13.002 reflect good governance practice and are consistent with pending legislation. The proposed changes formally set standards for all DSO operations, such as requiring delegation and expenditure policies, and confirm the Board's oversight through the appointment of directors and executive committee members. Most USF DSOs already voluntarily comply with these standards. The proposed changes also confirm the longstanding practice of USF DSOs to not use state funds for DSO travel.



3) The Articles of Incorporation and Bylaws of a Support Organization of the USF System and all amendments of such Articles or Bylaws shall be recommended and presented by the President of the USF System ("President") to the Board for review and approval.

- a) The Articles or Bylaws, as applicable, of a Support Organization shall require the appointment of at least one representative to the Support Organization's board of directors and its executive committee by the Board Chair. The Board Chair's representative(s) may be selected by the Board Chair from the existing membership of the Support Organization's board of directors or its executive committee.
- b) The Support Organization shall provide the Board Chair with a list of its current board of directors and executive committee members on an annual basis.

(6) Support Organizations shall provide for an annual financial audit and management letter as prescribed by, and in accordance with, applicable law, regulations (including USF Regulation 13.002, Direct-Support Organizations and Health Services Support Organizations) and internal management memoranda. The letter shall be forwarded to the Board for review, oversight and approval. The Board shall have the right to inspect and audit the books and records of Support Organizations, which must be made available to the Board upon request.

(7) Support Organizations shall adopt the following policies:

- a) Conflict of Interest and Financial Code of Ethics Policy
- b) Expenditure Policy
- c) Signatory Authority Policy
- d) Procurement Policy (to include supplier diversity)
- e) Travel Policy
- f) Internal Controls and Internal Audit Policy
- e)g) Workplace Discrimination and Retaliation Policy
- b)h) Public Appearance Policy

Support Organizations may adopt such other policies and procedures deemed appropriate by their board of directors. The board of directors of each Support Organization shall certify to the Board that all of the above policies are adopted and reviewed on an annual basis.

(9) The Board is authorized to revoke certification of an organization as a Support Organization of the USF System if it determines, in its sole discretion, that the organization is no longer serving the best interest of the USF System. If certification is revoked, the Board shall determine the disposition of the Support Organization's assets and liabilities in accordance with applicable laws, the Support Organization's Articles of Incorporation and Bylaws.

(9) A Support Organization is prohibited from giving, either directly or indirectly, any gift to a political committee as defined in Section 106.011, Florida Statutes.

(10) A Support Organization is prohibited from using state funds for Support Organization travel expenses.



REGULATION

USF System USF USFSP USFSM

Number: USF13.002
Title: Direct Support Organizations and Health Services Support Organizations
Responsible Office: USF System Services

Date of Origin: 11-20-03 **Date Last Amended:** 8-17-15 (technical) **Date Last Reviewed:** 8-17-15

(1) An organization seeking to receive, hold, invest and administer property and to make expenditures to, or for, the benefit of the University of South Florida System (“USF System”) may request approval by the University of South Florida Board of Trustees (“Board”) to become a direct-support organization, as provided in [Section 1004.28, Florida Statutes](#). An organization seeking to enter into arrangements with other entities as providers in other integrated health care systems or similar entities for the exclusive benefit of the USF System may request approval by the Board to become a health services support organization, as provided in [Section 1004.29, Florida Statutes](#). In no case shall the USF System have any responsibility for acts, debts, liabilities, and obligations incurred or assumed by a health services support organization.

(2) Upon approval by the Board, a direct-support organization or health services support organization (“Support Organization[s]”) shall be certified and authorized to use the property, facilities and personnel services of the USF System to the extent permissible by applicable law, the conditions prescribed by regulations, and internal management memoranda of the USF System.

(3) The Articles of Incorporation and Bylaws of a Support Organization of the USF System and all amendments of such Articles or Bylaws shall be recommended and presented by the President of the USF System (“President”) to the Board for review and approval.

- a) The Articles or Bylaws, as applicable, of a Support Organization shall require the appointment of at least one representative to the Support Organization’s board of directors and its executive committee by the Board Chair. The Board Chair’s representative(s) may be selected by the Board Chair from the existing membership of the Support Organization’s board of directors or its executive committee.
- b) The Support Organization shall provide the Board Chair with a list of its current

board of directors and executive committee members on an annual basis.

(4) Operating budgets of Support Organizations shall be prepared at least annually, approved by the organization's governing board, and presented by the President to the Board for review and approval.

(5) Expenditure plans of Support Organizations shall be reviewed and approved quarterly by the President or designee; said designee shall be a vice president, provost or other duly authorized senior officer of the USF System reporting directly to the President and having operational responsibility on behalf of the USF System for the Support Organization.

(6) Support Organizations shall provide for an annual financial audit and management letter as prescribed by, and in accordance with, applicable law, regulations (including USF Regulation 13.002, Direct-Support Organizations and Health Services Support Organizations) and internal management memoranda. The letter shall be forwarded to the Board for review, oversight and approval. The Board shall have the right to inspect and audit the books and records of Support Organizations, which must be made available to the Board upon request.

(7) Support Organizations shall adopt the following policies:

- a) Conflict of Interest and Financial Code of Ethics Policy
- b) Expenditure Policy
- c) Signatory Authority Policy
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- e) Travel Policy
- f) Internal Controls and Internal Audit Policy
- a)g) Workplace Discrimination and Retaliation Policy
- b)h) Public Appearance Policy

Support Organizations may adopt such other policies and procedures deemed appropriate by their board of directors. The board of directors of each Support Organization shall certify to the Board that all of the above policies are adopted and reviewed on an annual basis.

(6)(8) The Board is authorized to revoke certification of an organization as a Support Organization of the USF System if it determines, in its sole discretion, that the organization is no longer serving the best interest of the USF System. If certification is revoked, the Board shall determine the disposition of the Support Organization's assets and liabilities in accordance with applicable laws, the Support Organization's Articles of Incorporation and Bylaws.

(9) A Support Organization is prohibited from giving, either directly or indirectly, any gift to a political committee as defined in [Section 106.011, Florida Statutes](#).

(10) A Support Organization is prohibited from using state funds for Support Organization travel expenses.

Authority: Art. IX, Sec. 7, Fla. Constitution; BOG Regulations 1.001, 9.011; Sections 1004.28, 1004.29, F.S.

History: New (BOT approval) 11-20-03, Formerly 6C4-13.002, F.A.C., Amended 9-10-09, 10-24-12, 8-17-15 (technical).

Certification: USF certifies that it has followed the Florida Board of Governors Regulation Development Procedure and has a record of written notices, comments, summaries and responses as required.

Agenda Item: FL 111

USF Board of Trustees
(March 6, 2018)

Issue: Amend and Update Board of Trustees Operating Procedures

Proposed action: Recommend to the Board Amendments to the Board's Operating Procedures.

Executive Summary:

The changes to the Operating Procedures are intended to match the proposed changes to the DSO regulation with Board's operating procedures. For example, one of the new responsibilities of the Board Chair is to appoint a representative to each DSO board and executive committee. Additional technical changes are proposed for committee appointments and appearances before the Board.

Strategic Goal(s) Item Supports: 4

BOT Committee Review Date:

Supporting Documentation Online (please circle): **Yes**

No

[Summary of BOT Operating Procedures Changes](#)
[BOT Operating Procedures](#)

USF System or Institution specific: USF System

Prepared by: Gerard D. Solis

USF Board of Trustees (March 6, 2018)

Issue: Amend and Update Board of Trustees Operating Procedures

Proposed action: Recommend to the Board Amendments to the Board's Operating Procedures.

Executive Summary:

The changes to the Operating Procedures are intended to match the proposed changes to the DSO regulation with Board's operating procedures. For example, one of the new responsibilities of the Board Chair is to appoint a representative to each DSO board and executive committee. Additional technical changes are proposed for committee appointments and appearances before the Board.



B. Members

The Board of Trustees shall be composed of thirteen persons, six members appointed by the Governor of the State of Florida and five members appointed by the Board of Governors. The other two members shall be (1) the elected representative of the University of South Florida System Student Advisory Council and (2) the President of the University of South Florida System Faculty Council.

Board of Trustees' members who are appointed by the Governor and Board of Governors shall be appointed for 5-year terms.

Members of the Board of Trustees and the Campus Boards shall not serve on any other non-advisory Board of the University or its Direct Support Organizations during their appointed term(s). However, this limitation does not apply to the Board representatives for: the student body serving on the USF System Student Advisory Council; the faculty representative serving on the USF System Faculty Advisory Council; Board members serving on the USF St. Petersburg and USF Sarasota-Manatee Campus Boards pursuant to Sections 1004.33 and 1004.34 Florida Statutes; and service on Boards with which the University has an affiliation agreement. Also, this section shall not apply to advisory boards of the University System provided the Trustee or Campus Board member promptly discloses his or her membership on the advisory board(s) to the Board Chair and Corporate Secretary. For the purposes of this section an advisory board shall be an entity created solely for the purposes of advising university leadership through voluntary consultations and non-binding recommendations or opinions.

The officers shall have the following responsibilities:

1. **Chair**

a. The Chair serves as Chair of the Finance Committee, serves as an ex officio voting member of all University Strategic Priority Committees, Standing Committees and Ad Hoc Committees of the Board, and appoints members thereof.

b. The Chair presides at all meetings of the Board of Trustees, calls special meetings of the Board when necessary, serves as spokesperson for the Board, attest to actions of the Board and notify the Governor or Board of Governors in writing whenever a Board member fails to attend three consecutive regular meetings in any fiscal year, which may be grounds for removal.

c. The Chair shall appoint at least one a representative to the board of directors and the executive committee of any direct-support organization certified by the Board.

ARTICLE III COMMITTEES

A. The Governance Committee

The Governance Committee shall have five (5) voting members, all of whom shall be trustees. In addition, the President of the University System shall be a non-voting ex-officio member of the Governance Committee and will not be counted as part of a quorum for the purpose of transacting business. The Chair and Vice-Chair of the Board of Trustees shall be members. In addition, three (3) trustees shall be appointed by the Chair ~~at the annual meeting~~ to serve on the Governance committee. A majority of Governance Committee members shall constitute a quorum.

The purpose of the Governance Committee is twofold: to conserve time, it shall serve at the pleasure of the Board as the Board's agent in assisting the President to address routine business between regular Board meetings; and it shall assist the Chair and the President in their joint responsibility to help the Board to function effectively and efficiently by suggesting board meeting agenda items and periodically assessing committee work. The Governance Committee shall have authority to act for the Board of Trustees on all matters except for the following, which shall be reserved for the full Board: appointing and removing the President; approving or discontinuing programs; board officer selection; Campus Board membership; changes in institutional mission and purposes; changes to the operating procedures; incurring of corporate indebtedness; and adoption of the annual budget. These operating procedures or other board policy may reserve other powers for the Governance Committee.

The Governance Committee shall meet as often as necessary to conduct business as the Chair and President shall determine, and it shall ensure that minutes are taken of such meetings which will be distributed to all Trustees for information at the next regular meeting of the Trustees.

B. University Strategic Priority Committees

The Chair of the Board may establish such University Strategic Priority Committees as deemed necessary for the orderly conduct of the business of the Board. These Committees relate directly to the strategic priorities of the University. The Chair of the Board appoints the members, any non-voting ~~appoints-the~~ faculty and community liaisons, selects a Chair of the Committee, and serves as an ex officio voting member (when present) of all Committees.

University Strategic Priority Committees' action is reported as a recommendation for consideration and action by the full Board. If the full Board, however, authorizes a strategic priority workgroup to take final action on a matter referred to it, the Chair of the Committee shall report the action taken to the Board at its next scheduled meeting.

The University Strategic Priority Committees shall meet as often as the Chair of the Committee shall determine. Minutes shall be taken and distributed to all Trustees for information at the next regular meeting of the Trustees. A majority of University Strategic Priority Committee members shall constitute a quorum for transaction of business.

C. Standing Committees

Standing Committees may be appointed by the Board Chair. The Board Chair appoints the members, any non-voting faculty and community liaisons, selects a Chair of the Committee, and serves as an ex officio voting member (when present) of all Committees. Each standing committee shall consist of no fewer than three (3) members. Members of standing committees shall hold office until the appointment of their successors. Any vacancies on standing committees shall be filled by appointment of the Board Chair. Unless specifically delegated or as otherwise provided in these Operating Procedures, authority to act on all matters is reserved to the Board. The duty of each standing committee is to consider and to make recommendations to the Board upon matters referred to it. Each standing committee shall have a written statement of purpose and primary responsibilities as approved by the Board. The Chairs of all standing committees shall perform their duties in consultation with the University System President and/or designee. Minutes shall be taken and distributed to all Trustees.

D. Ad Hoc Committees

Ad Hoc Committees may be appointed by the Board Chair with such powers and duties and period of service as the Board Chair may determine. The Board Chair appoints the members, appoints any non-voting faculty and community liaisons, selects a Chair of the Committee, and serves as an ex officio voting member (when present) of all Committees. Unless specifically delegated or as otherwise provided in these Operating Procedures, authority to act on all matters is reserved to the Board and the duty of each ad hoc committee shall be to consider and to make recommendation to the Board upon matters referred to it. Each ad hoc committee shall have a written statement of purpose and primary responsibilities as approved by the Board. The Chair of any ad hoc committees shall perform their duties in consultation with the University System President and/or designee. Minutes shall be taken and distributed to all Trustees.

ARTICLE VI APPEARANCES BEFORE THE BOARD

Individuals or group representatives, who desire to appear before the Board to address a subject within the Board's jurisdiction may submit their requests in writing at least three (3) days in advance to the Corporate Secretary, c/o Office of Board of Trustees Operations, 4202 E. Fowler Avenue, CGS401, Tampa, FL 33620, specifying the agenda ~~item~~ item on which the requestor(s) wishes to comment.

Comments shall generally be heard at Board Committees. However, the President in consultation with the Chair will determine whether the item will be heard and when the item will be heard. ~~As permitted by section 286.0114 F.S., the~~ There will be a three minute time limit on any presentation. The total time allotted for all comments shall not exceed fifteen minutes, unless approved by the Chair. ~~Board~~

As permitted by section 286.0114 F.S., the Chair may ~~place reasonable time limits on any presentation or may~~ decline to hear any matter that: does not relate to a particular agenda item; is not practicable for a particular meeting; ~~is;~~ is outside the Board's jurisdiction; or was made available for public comment at a prior workgroup ~~or committee~~ or committee meeting before the Board takes action.

The Chair may recognize any individual or representative of groups to address the Board.

**OPERATING PROCEDURES OF
THE UNIVERSITY OF SOUTH FLORIDA
BOARD OF TRUSTEES**

**ARTICLE I
ORGANIZATION**

A. Legal Status of Board of Trustees

The University of South Florida Board of Trustees (“Board of Trustees”) is established as a public body corporate, with all powers as provided by Florida law. The Board of Trustees acts as an instrumentality or agency of the state for purposes of sovereign immunity pursuant to Section 768.28(2), Florida Statutes.

B. Members

The Board of Trustees shall be composed of thirteen persons, six members appointed by the Governor of the State of Florida and five members appointed by the Board of Governors. The other two members shall be (1) the elected representative of the University of South Florida System Student Advisory Council and (2) the President of the University of South Florida System Faculty Council.

Board of Trustees’ members who are appointed by the Governor and Board of Governors shall be appointed for 5-year terms.

Members of the Board of Trustees and the Campus Boards shall not serve on any other non-advisory Board of the University or its Direct Support Organizations during their appointed term(s). However, this limitation does not apply to the Board representatives for: the student body serving on the USF System Student Advisory Council; the faculty representative serving on the USF System Faculty Advisory Council; Board members serving on the USF St. Petersburg and USF Sarasota-Manatee Campus Boards pursuant to Sections 1004.33 and 1004.34 Florida Statutes; and service on Boards with which the University has an affiliation agreement. Also, this section shall not apply to advisory boards of the University System provided the Trustee or Campus Board member promptly discloses his or her membership on the advisory board(s) to the Board Chair and Corporate Secretary. For the purposes of this section an advisory board shall be an entity created solely for the purposes of advising university leadership through voluntary consultations and non-binding recommendations or opinions.

Members of the Board of Trustees shall serve without compensation but may be reimbursed for travel and per diem expenses in accordance with state law.

C. Officers

The officers of the Board of Trustees are the Chair, Vice-Chair and the Corporate Secretary. The Chair and Vice-Chair shall be elected by majority vote by the Board of Trustees at appropriate times and shall each serve two-year terms to begin immediately upon election. The Chair may serve for one additional consecutive 2-year term by majority vote, and for each additional consecutive term beyond two terms, may be reelected by a two-thirds vote. The University System President shall serve as Corporate Secretary of the Board of Trustees.

In the event of a vacancy in the Chair and/or Vice Chair positions, an election will be held as soon as practical after the vacancy occurs to select a member of the Board, by a majority vote, to the applicable vacant position (s). The newly selected officer (s) will serve terms as specified in the above section. This may result in the Board Chair and Vice Chair terms of office not running concurrently.

The officers shall have the following responsibilities:

1. **Chair**

a. The Chair serves as Chair of the Finance Committee, serves as an ex officio voting member of all University Strategic Priority Committees, Standing Committees and Ad Hoc Committees of the Board, and appoints members thereof.

b. The Chair presides at all meetings of the Board of Trustees, calls special meetings of the Board when necessary, serves as spokesperson for the Board, attest to actions of the Board and notify the Governor or Board of Governors in writing whenever a Board member fails to attend three consecutive regular meetings in any fiscal year, which may be grounds for removal.

c. The Chair shall appoint at least one a representative to the board of directors and the executive committee of any direct-support organization certified by the Board.

2. **Vice-Chair**

The Vice-Chair acts as Chair during the absence or disability of the Chair and during any temporary period of vacancy before election of a new Board Chair pursuant to Section C, 1 above and, in that event, shall perform those duties of the Chair described hereinabove.

3. **Corporate Secretary**

a. The University System President, as Corporate Secretary, is responsible to the Board for all operations and administration of the University and sets the agenda for meetings of the Board in

consultation with the Chair. During the absence or disability of the University System President, the Provost and Executive Vice President will function as Corporate Secretary. The President may designate an individual to serve as assistant corporate secretary to the Board. This individual shall perform all duties delegated by the corporate secretary.

b. The President serves as the official contact between the Board and the faculty, staff, students and support organizations of the University System. The President exercises such powers as are appropriate to his/her position in promoting, supporting and protecting the interests of the University System and in managing and directing its affairs. The President shall have the authority to execute all documents on behalf of the university and the Board consistent with law, applicable Board of Governors' and Board of Trustees' rules and policies, and the best interests of the university. The President may issue directives and executive orders that are not in contravention of existing Board policies. The President is responsible for all educational, financial, business and administrative functions of the University System to advance its educational missions and goals, consistent with University policy, and exercises such other powers, duties and responsibilities as are delegated or established by the Board.

D. Board of Trustees

The Board of Trustees is responsible for cost-effective policy decisions, implementing and maintaining high-quality education programs consistent with the university's mission, measuring the University System performance and providing input regarding compliance with state policy, budgeting and education standards. The Board of Trustees sets policy for the University System and serves as its legal owner and final authority. As the "public body corporate" for the university, the Board holds the university's financial, physical and human assets and operations in trust and is responsible for efficient and effective use of resources. It must ensure the performance of all duties assigned by law, rules and regulations of the Florida Board of Governors. The Board, pursuant to Section 1004.28 Florida Statutes, provides budget and audit review and oversight of university Direct Support Organizations and establishes the conditions with which they must comply in order to use property, facilities or personal services at the university. The Board may adopt rules, regulations and policies consistent with established laws and the university's mission and strategic plan. Board members establish policy and assess the implementation of Board policies. When the Board, through majority vote at a public meeting, establishes a new rule, regulation or policy it will be promulgated as follows:

1. Rules- in accord with the requirements set forth in Ch. 120, F.S.;
2. Regulations- in accord with the provisions of the Board of Governor's Regulation Development Procedure for State University Boards of Trustees; and
3. BOT Policies- the Corporate Secretary shall assign each BOT policy to the General Counsel office for promulgation with a distinct number that includes the year in which the policy was established (e.g. 2007-01) and posting the policy to the Office of the General Counsel web page.

The specific membership, powers and duties of the Board are authorized by Article 9, Section 7 of the Florida Constitution, and Sections 1001.71, 1001.72 and 1001.73, Florida Statutes.

ARTICLE II MEETINGS OF THE BOARD OF TRUSTEES

A. Regular Meetings

The Board meets no fewer than four times per fiscal year, at a time and place designated by the Chair. Meetings of the Board are open to the public and all official acts are taken at public meetings. The schedule of meetings is available on the University of South Florida website at <http://www.usf.edu>.

B. Special Meetings

The Board may meet in special meetings, including hearings and workshops, at such times and places designated by the Chair.

C. Emergency Meetings

Emergency meetings of the Board may be called by the Chair of the Board upon such notice as is reasonable under the circumstances whenever, in the opinion of the Chair, an issue requires immediate Board action. Whenever such emergency meeting is called, the Chair will notify the Corporate Secretary. The Corporate Secretary will immediately serve either verbal or written notice upon each member of the Board, stating the date, hour and place of the meeting and the purpose for which the meeting has been called. No other business will be transacted at the meeting unless additional emergency matters are agreed to by a majority of those Board members in attendance. The minutes of each emergency meeting will reflect the manner and method by which notice of such emergency meeting was given to each member of the Board.

D. Notice of Meetings

Notice, stating the time, date, place and agenda or purpose of the meeting. of regular meetings, special meetings and committee meetings shall be posted on the USF Website, and shall be distributed through an appropriate USF list serve. Notice will be given not less than seven (7) days, if practicable, before the event and will include a statement of the general subject matter to be considered. Whenever an emergency meeting is scheduled, the Corporate Secretary will post a notice on the USF Website, and distribute same through an appropriate USF list serve as soon as practicable stating the time, date, place and agenda or purpose of the meeting.

E. Meetings by Means of Telephone Conference Calls and other Communications Media Technology

The Board may use telephone conference calls and other communications media technology to conduct Board business in the same manner as if the proceeding were held in person. The notice of any meeting conducted by means of communication media technology will state where and how members of the public may gain access to the meeting. Such notice will be in accordance with the notice procedures set forth above.

F. Quorum

A majority of the members of the Board must be present to constitute a quorum for the transaction of business.

G. Voting

The decision of the majority of the Trustees in attendance and voting on an issue shall prevail, except that a majority vote of all members of the Board is required for appointing and removing the president and for approving or discontinuing academic programs. A Trustee may abstain from voting only under those circumstances prescribed by law. Voting by proxy or by mail shall not be permitted.

H. Parliamentary Rules

The most recent version of Roberts Rules of Order Newly Revised (11th ed.) will be followed in conducting meetings of the Board, unless otherwise provided by the Board.

I. Agenda

The agenda for each meeting of the Board shall be prepared by the President or his/her designee. Every request for inclusion of an item on the agenda of a meeting shall be put in writing and filed, together with any supporting documents, with the President sufficiently far in advance of the meeting to permit a determination to be

made by the President with respect to the propriety and practicability of including that item on the agenda for the meeting. The President will assemble the agenda and provide a copy of the agenda to each member of the Board at least seven (7) days prior to the meeting and will post the agenda to the USF list serve, the USF Board of Trustees website and with the University Communications Office prior to the meeting. If additional items or supporting documentation become available, a supplemental agenda may be provided at least five (5) days prior to the meeting.

Per HB 7019 any proposal to the Board to increase tuition or fees shall be publicly noticed at least 28 days before its consideration at a board of trustees meeting. Such notice will be in accordance with the notice procedures set forth in s. 1009.24, F.S.

J. Minutes

Minutes of the meetings of the Board of Trustees shall be kept by the Corporate Secretary or designee, who shall cause them to be posted on the Board website and to other places where deemed appropriate within two weeks after each Board meeting. Minutes must include the vote history and attendance of each trustee. All lengthy reports shall be referred to in the minutes and shall be kept on file as part of the University records, but such reports need not be incorporated in the minutes except when so ordered by the Board of Trustees.

**ARTICLE III
COMMITTEES**

A. The Governance Committee

The Governance Committee shall have five (5) voting members, all of whom shall be trustees. In addition, the President of the University System shall be a non-voting ex-officio member of the Governance Committee and will not be counted as part of a quorum for the purpose of transacting business. The Chair and Vice-Chair of the Board of Trustees shall be members. In addition, three (3) trustees shall be appointed by the Chair ~~at the annual meeting~~ to serve on the Governance committee. A majority of Governance Committee members shall constitute a quorum.

The purpose of the Governance Committee is twofold: to conserve time, it shall serve at the pleasure of the Board as the Board's agent in assisting the President to address routine business between regular Board meetings; and it shall assist the Chair and the President in their joint responsibility to help the Board to function effectively and efficiently by suggesting board meeting agenda items and periodically assessing committee work. The Governance Committee shall have authority to act for the Board of Trustees on all matters except for the following, which shall be reserved for the full Board: appointing and removing the President; approving or discontinuing programs; board officer selection; Campus Board

membership; changes in institutional mission and purposes; changes to the operating procedures; incurring of corporate indebtedness; and adoption of the annual budget. These operating procedures or other board policy may reserve other powers for the Governance Committee.

The Governance Committee shall meet as often as necessary to conduct business as the Chair and President shall determine, and it shall ensure that minutes are taken of such meetings which will be distributed to all Trustees for information at the next regular meeting of the Trustees.

B. University Strategic Priority Committees

The Chair of the Board may establish such University Strategic Priority Committees as deemed necessary for the orderly conduct of the business of the Board. These Committees relate directly to the strategic priorities of the University. The Chair of the Board appoints the members; ~~any non-voting appoints the~~ faculty and community liaisons, selects a Chair of the Committee, and serves as an ex officio voting member (when present) of all Committees.

University Strategic Priority Committees' action is reported as a recommendation for consideration and action by the full Board. If the full Board, however, authorizes a strategic priority workgroup to take final action on a matter referred to it, the Chair of the Committee shall report the action taken to the Board at its next scheduled meeting.

The University Strategic Priority Committees shall meet as often as the Chair of the Committee shall determine. Minutes shall be taken and distributed to all Trustees for information at the next regular meeting of the Trustees. A majority of University Strategic Priority Committee members shall constitute a quorum for transaction of business.

C. Standing Committees

Standing Committees may be appointed by the Board Chair. The Board Chair appoints the members; any non-voting faculty and community liaisons, selects a Chair of the Committee, and serves as an ex officio voting member (when present) of all Committees. Each standing committee shall consist of no fewer than three (3) members. Members of standing committees shall hold office until the appointment of their successors. Any vacancies on standing committees shall be filled by appointment of the Board Chair. Unless specifically delegated or as otherwise provided in these Operating Procedures, authority to act on all matters is reserved to the Board. The duty of each standing committee is to consider and to make recommendations to the Board upon matters referred to it. Each standing committee shall have a written statement of purpose and primary responsibilities as approved by the Board. The Chairs of all standing committees shall perform their

duties in consultation with the University System President and/or designee. Minutes shall be taken and distributed to all Trustees.

D. Ad Hoc Committees

Ad Hoc Committees may be appointed by the Board Chair with such powers and duties and period of service as the Board Chair may determine. The Board Chair appoints the members, appoints any non-voting faculty and community liaisons, selects a Chair of the Committee, and serves as an ex officio voting member (when present) of all Committees. Unless specifically delegated or as otherwise provided in these Operating Procedures, authority to act on all matters is reserved to the Board and the duty of each ad hoc committee shall be to consider and to make recommendation to the Board upon matters referred to it. Each ad hoc committee shall have a written statement of purpose and primary responsibilities as approved by the Board. The Chair of any ad hoc committees shall perform their duties in consultation with the University System President and/or designee. Minutes shall be taken and distributed to all Trustees.

**ARTICLE IV
REGIONAL CAMPUS BOARDS**

The USF System is comprised of three (3) separately accredited institutions (i.e., regional campus), USF, USF St. Petersburg and USF Sarasota-Manatee. The Board shall appoint members to the Campus Boards, from recommendations of the USF System President, for USF St. Petersburg and USF Sarasota-Manatee. Consonant with the State Constitution, members shall hold no other State office. Members shall be appointed for 4-year terms. Campus Board members serve at the will of the Board and may be removed by the Board for non-fulfillment of Campus Board duties.

Members may be reappointed, at the discretion of the Board, for additional terms to Campus Boards not to exceed eight (8) years of service.

In addition, a member of the USF Board of Trustees shall serve as provided below.

- A. USF St. Petersburg** -- If a resident of Pinellas County is appointed to the Board of Trustees of the University, the Board shall appoint that member to serve jointly as a member of the Campus Board. If more than one Pinellas County resident is appointed to the Board of Trustees, the Board shall select one joint member.
- B. USF Sarasota-Manatee** -- If a resident of Sarasota-Manatee Counties is appointed to the Board of Trustees of the University, the Board shall appoint that member to serve jointly as a member of the Campus Board. If more than one Sarasota-Manatee County resident is appointed to the Board of Trustees, the Board shall select one joint member.

- C. Authority** -- As provided by applicable state law or regulation, the Regional Campus Boards shall have the authority to:
1. Review and approve an annual campus legislative budget request, which will be submitted to the Commissioner of Education through the Florida Board of Governors as a separately identified section to the USF legislative budget request. The Campus Executive Officer shall prepare the legislative budget request in accordance with guidelines established by the Florida Board of Governors. This request must include items for campus operations and fixed capital outlay.
 2. Approve and submit an annual operating plan and budget for review and consultation by the University Board of Trustees. The campus operating budget must reflect the actual funding available to that campus from separate line-item appropriations contained in each annual General Appropriations Act.
 3. Enter into central support services contracts with the University Board of Trustees for any services that the Regional Campus cannot provide more economically, including payroll processing, accounting, technology, construction administration, and other desired services. However, all legal services for the campus must be provided by a central services contract with the University. The University Board of Trustees and the Campus Board shall determine in a letter of agreement any allocation or sharing of student fee revenue between the University's main campus and each Regional Campus. In addition, various University units may enter into contracts with the Regional Campus for any services that the University desires the Regional Campus to provide.
 4. The Campus Board will consult with the University President and Campus Executive Officer in the development of a Campus Strategic Plan, and periodic updates to the plan, to ensure campus development that is consonant with regional needs and that the campus meets the requirements necessary for separate accreditation by the Southern Association of Colleges and Schools. The Campus Strategic Plan and updates will be submitted to the University President for review, approval and inclusion in the University Strategic Plan, which will go to the Board of Trustees for consideration. The Campus Strategic Plan will guide the development of Legislative Budget Requests and Campus Operating Budgets.
 5. The Campus Board will regularly review enrollment patterns to ensure that the campus builds the full-time-equivalent student base required for the long-term support of existing and planned programs.

6. The Campus Board will exercise other such powers as are lawfully delegated by the University Board of Trustees to provide for the efficient operation and improvement of the campus.
- D.** Upon enactment of the state budget, the Campus Executive Officer will consult with the Campus Boards and the USF System President and/or designee to develop for each regional campus an operating budget that advances the strategic goals for the campus, consistent with state law.

The operating budget for each Regional Campus that was developed through the consultative process will be submitted to the Board of Trustees through the appropriate committee. Upon approval by the Board of Trustees, the regional campus operating budgets will be reflected in the University of South Florida System operating budget.

The Board of Trustees appointed member shall chair their respective Campus Board unless otherwise approved by the Board of Trustees Chair.

ARTICLE V AMENDMENT OF OPERATING PROCEDURES

These Operating Procedures may be altered, amended or repealed by a majority vote of Board members in attendance at any regular meeting, when notice of the proposed amendment or repeal is provided in the meeting notice.

ARTICLE VI APPEARANCES BEFORE THE BOARD

Individuals or group representatives, who desire to appear before the Board to address a subject within the Board's jurisdiction may submit their requests in writing at least three (3) days in advance to the Corporate Secretary, c/o Office of Board of Trustees Operations, 4202 E. Fowler Avenue, CGS401, Tampa, FL 33620, specifying the agenda ~~item~~ they item on which the requestor(s) wishes to comment ~~peak about~~.

Comments shall generally be heard at Board Committees. However, the President in consultation with the Chair will determine whether the item will be heard and when the item will be heard. ~~As permitted by section 286.0114 F.S., the~~ There will be a three minute time limit on any presentation. The total time allotted for all comments shall not exceed fifteen minutes, unless approved by the Board Chair. ~~Board~~

As permitted by section 286.0114 F.S., the Board Chair may place reasonable time limits on any presentation or may decline to hear any matter that: does not relate to a particular agenda item; is not practicable for a particular meeting; ~~is;~~ is outside the Board's

jurisdiction; or was made available for public comment at a prior ~~workgroup or committee or committee~~ meeting before the Board takes action.

The Chair may recognize any individual or representative of groups to address the Board.

In order to proceed with the essential business of the Board in an orderly manner, any individual or group representative who attempts to disrupt a Board meeting will be subject to appropriate action pursuant to law.

ARTICLE VII CODE OF ETHICS

Trustees are Public Officers of the State of Florida who are invested with the public trust and appointed as fiduciaries of the University. Trustees will exercise their powers and duties in the best interests of the University and avoid actions or situations that result in or create the appearance of using their positions with the University for private gain, unwarranted preferential treatment to themselves or any outside individual or organization, or that calls into question a Trustee's independence and impartiality, or adversely affects the University's reputation.

At the same time, Trustees have a range of professional and personal associations and interests with individuals and other entities. These associations and interests routinely benefit the University and enhance the effectiveness of the Board. However, Trustees should also avoid situations where external associations or interests could compromise, or reasonably appear to compromise, the University's academic values or business decisions, including but not limited to admissions and employment matters. Accordingly, it is the policy of the Board that all Trustees will act in a manner consistent with their fiduciary responsibilities to the University and avoid circumstances in which their external financial or other ties could present an actual or potential conflict of interest.

1. Presumed Conflict of Interest

No policy statement can address every conceivable situation that might entail a conflict of interest. However, the following are presumed to create a conflict of interest:

- a. the Trustee's financial interests or other opportunities for personal benefit may compromise, or reasonably appear to compromise, the Trustee's independence of judgment in fulfilling his/her Board duties; or
- b. the Trustee or a member of his or her family, has an existing or potential financial interest or other opportunities for personal benefit relative to a university matter or initiative.

2. Conflict of Interest Disclosure

If a Trustee believes that he/she may have a conflict of interest, the Trustee shall fully and promptly disclose the conflict to the Secretary, Assistant Corporate Secretary or the General Counsel.

The Corporate Secretary, Assistant Corporate Secretary or the General Counsel shall inform the Board Chair of all conflict of interest matters disclosed by a Trustee. If it is determined that a conflict of interest exists, the Board Chair, Corporate Secretary or Assistant Corporate Secretary, and the General Counsel shall work with the affected Trustee to address the conflict.

In addition, all Trustees shall annually list on the Conflict of Interest Disclosure Form the following relationships.

- a. Relationships that they or members of their family maintain with organizations that do business with the University; or
- b. Relationships and external interests that could be construed to affect their independent, unbiased judgment in light of their decision-making authority and responsibility. If a Trustee is uncertain as to whether to list a particular relationship, the General Counsel should be consulted.

Information shared or gathered as a result of such consultations (including information provided on the disclosure form) shall not be released except: in accordance with applicable public records laws; or when the institution's best interests would be served by disclosure, or as required by court order. Any such required disclosure will be made only after informing the affected Trustee.

3. Voting

Trustees are required to disclose all potential conflicts of interests as described above, but Trustees are still required to vote on all matters before the Board unless an actual conflict of interest as prescribed by law exists. In actual conflict of interest situations, Trustees are not permitted to vote. In situations that involve the appearance or potential of a conflict of interest and a Trustee is present and required to vote, the appearance or potential of the conflict of interest will be disclosed publicly at the Board meeting in which the affected matter is being considered.

4. Public Officers

In addition to the foregoing, members of the Board of Trustees shall be guided by the provisions set forth in Florida law for the conduct of public officers.

5. Regional Campus Board Members

This Code of Ethics applies equally to Trustees and Regional Campus Board Members. Disclosures from Regional Campus Board Members should be made to the Regional Chancellor and the General Counsel, who will notify the Board Chair and Secretary in the event of an actual conflict.

**ARTICLE VIII
MISCELLANEOUS PROVISIONS**

A. Indemnification

The University of South Florida (University) shall indemnify, defend, and hold harmless each Trustee of and from any and all claims, demands, civil or criminal actions, rights, defenses, counterclaims, proceedings, administrative actions, agreements, contracts, covenants, accounts, offsets, attorneys' fees, costs, damages, liabilities, losses, expenses, suits, debts, judgments, awards, duties or obligations, of any nature whatsoever, at law or in equity (collectively referred to as "Claims"), that arise from or relate in any way to his or her position on the Board of Trustees, or any act undertaken or omitted in connection with his or her service as a Trustee.

B. Fiscal Year

The fiscal year of the Board shall commence on July 1 of each year and end on June 30.

C. Sunshine Laws

Public access to Board records will be governed by the provisions of the Public Records Law, Chapter 119, F.S. Board meetings shall be governed by the provisions of the Open Meetings Law, Chapter 286, F.S.

D. Corporate Seal

The corporation shall have a seal on which shall be inscribed "The University of South Florida Board of Trustees".

Approved 9/21/01; Amended 03/21/02; Amended 01/21/03; Amended 06/12/08 ; Amended 06/14/12; Amended, 12/5/13; Amended 06/03/16; Amended 09/01/16

Agenda Item: FL 112

USF Board of Trustees
(March 6, 2018)

Issue: Annual Renewal of President Genshaft's Contract

Proposed action: Recommend to the Board the Approval of the President's annual contract for 2018-2019.

Executive Summary:

President Genshaft's 2017-2018 annual contract ends June 30, 2018. The Governance Committee reviewed and approved the 2018-2019 contract being presented to the Board. The Committee recommends approval of the new contract. No substantive changes occurred from the 2017-2018 contract. Upon BOT approval, the Board Chair will submit it to the Board of Governors for ratification at their March meeting.

Strategic Goal(s) Item Supports: 1,2,3 & 4

BOT Committee Review Date:

Supporting Documentation Online (*please circle*):

Yes

No

[President's 2018-2019 Contract](#)

[President's Historical Record at USF](#)

[Presentation](#)

USF System or Institution specific: USF Sytem

Prepared by: Gerard D. Solis

PRESIDENTIAL CONTRACT

This Employment Agreement ("Agreement"), executed this ___ day of March 2018, and effective as of July 1, 2018, is entered into by and between the University of South Florida Board of Trustees, a public body corporate of the State of Florida for the University of South Florida System (the "University," the "Board," or the "Board of Trustees"), 4202 East Fowler Avenue, CGS 401, Tampa, Florida 33620, and Dr. Judy L. Genshaft, President of the University of South Florida (the "President" or "Dr. Genshaft"), 4202 East Fowler Avenue, CGS 401, Tampa, Florida 33620.

WHEREAS, Dr. Genshaft has served as President of the University since June 30, 2000 and has led the University through sustained growth to its present success;

WHEREAS, the Board of Trustees, acting on behalf of the University, has the current legal authority to determine the terms and conditions of employment of the President of the University;

WHEREAS, the Board of Trustees desires to continue the employment of Dr. Genshaft as President on the terms and conditions provided herein;

WHEREAS, both the University and Dr. Genshaft desire to set forth their respective rights and obligations in this Agreement;

WHEREAS, both the University and Dr. Genshaft intend this Agreement to become effective upon the termination or expiration of the current the Employment Agreement between the University and Dr. Genshaft dated March 30, 2016 (the "Prior Agreement");

WHEREAS, this Agreement has been duly approved and its execution has been duly authorized by the Board of Trustees; and

NOW, THEREFORE, in consideration of the mutual promises, covenants, and conditions contained herein, and other good and valuable consideration, the receipt and sufficiency of which is hereby acknowledged, it is agreed as follows:

1.0 Appointment as President

1.1 The University, on the terms specified in this Agreement, shall continue the appointment and employment of Dr. Judy Lynn Genshaft as its President of the University and to serve as the Chief Executive Officer of the University subject to the rules, regulations, policies, and supervision of the Board of Trustees. Dr. Genshaft accepts and agrees to such continued employment.

1.2 The President shall perform all duties required by law, by this Agreement, and customarily performed by presidents of public colleges and universities comparable in size to the University consistent with the applicable rules, regulations and policies of the University and the Florida Board of Governors. Those duties include, but are not limited, to:

1.2.1 Operating the University and the USF System;

1.2.2 Providing institutional, faculty, and educational leadership;

1.2.3 Strategic planning;

1.2.4 Fundraising;

1.2.5 Acting as corporate secretary to the Board;

1.2.6 Preparing a budget request and operating budget;

1.2.7 Establishing and implementing policies and procedures to recruit, appoint, transfer, promote, compensate, evaluate, reward, demote, discipline, and remove personnel;

- 1.2.8 Governing admissions;
- 1.2.9 Approving, executing, and administering contracts for the acquisition of commodities, goods, equipment, services, lease of real and personal property, and planning and construction;
- 1.2.10 Acting as custodian of all University property, including the authority to prioritize the use of University space, property, equipment, and resources;
- 1.2.11 Implementing approved programs for the University;
- 1.2.12 Establishing the internal academic calendar of the University;
- 1.2.13 Administering the University's program of intercollegiate athletics;
- 1.2.14 Recommending the establishment and termination of undergraduate and master's level degree programs within the approved role and scope of the University;
- 1.2.15 Awarding degrees;
- 1.2.16 Administering the schedule of tuition and fees to be charged by the University;
- 1.2.17 Entering into agreements for student exchange programs;
- 1.2.18 Approving the internal procedures of student government organizations and providing purchasing, contracting, and budgetary review processes for those organizations;
- 1.2.19 Adjusting property records and disposing of state-owned tangible property;
- 1.2.20 Maintaining all data and information pertaining to the operation of the University and reporting on the attainment by the University of institutional and statewide performance accountability goals;

- 1.2.21 Ensuring compliance with federal and state laws, regulations, and other requirements applicable to the University;
- 1.2.22 Reviewing periodically the operations of the University to determine how effectively and efficiently the University is being administered and whether it is meeting the goals of its strategic plan;
- 1.2.23 Organizing the University to achieve the goals of the University efficiently and effectively; and
- 1.2.24 Recommending the adoption of rules, regulations and policies to successfully implement provisions of law governing the operation and administration of the University and the items listed above.

2.0 Best Efforts as President

- 2.1 Dr. Genshaft agrees to faithfully, industriously, and with maximum application of experience, ability, and talent, and subject to Section 2.3 below, devote her full-time attention and energies to her duties as President of the University.
- 2.2 Those duties shall be performed for the University of South Florida System including at the three (3) campuses of the System, located in Tampa, St. Petersburg, and Sarasota-Manatee, Florida, and at USF Health and at such other place or places as the either the Board or the President deem appropriate for the interests, needs, business, or opportunity of the University.
- 2.3 The University recognizes that it is both appropriate and beneficial for the President to engage in outside activities, such as serving on for-profit and non-profit boards of directors, consulting, delivering speeches, and writing. The expenditure of reasonable amounts of time for personal or outside activities, as well as charitable

and professional development activities which are permitted provided such activities do not interfere with the services required to be rendered to the University under the provisions of this Agreement.

2.4 The President shall not engage in any activity that may be competitive with and adverse to the best interests of the Board and the University or that interferes with the duties set forth in Section 1.2 of this Agreement.

2.5 The President shall seek approval from the Board Chair, who may confer with the Governance Committee, prior to agreeing to serve on any board of directors of any entity or to engage in any substantial outside business activity, including authorship of books. Any and all income or other compensation earned by the President in connection with approved outside business activities shall be paid to and retained by her, and such income or other compensation shall have no effect on the amount of salary, compensation, and benefits she is otherwise entitled to receive under this Agreement.

3.0 Effective Date; Term of Appointment; Renewal; Leave; and Evaluation

3.1 The Board has previously employed Dr. Genshaft as President under the terms and conditions of the Prior Agreement for a term ending on June 30, 2018. The term of this Agreement shall be for a period of one (1) year, commencing on July 1, 2018 (the "Effective Date") and ending on June 30, 2019. This Agreement may be extended for additional one year terms upon mutual agreement of the parties following review of the President's performance by the Board and confirmation of reappointment of President Genshaft by the Florida Board of Governors in accordance with the Constitution and laws of the State of Florida.

- 3.2 Upon termination of her service as President, Dr. Genshaft shall be entitled to a 12-month professional development leave with the title of President Emeritus and compensated at her then current Base Salary and Benefits as stated in Section 4.0 (but not Section 5.0) of this Agreement. Professional development leave shall not be available if this Agreement is terminated due to termination for cause, death or disability under Sections 12 or 14 of this Agreement. This professional development leave is to permit President Genshaft to retool her teaching and research prior to resuming a fulltime faculty assignment on the Tampa campus of the University of South Florida System. In the event that Dr. Genshaft accepts full-time employment with an entity other than the University prior to the conclusion of her professional development leave, then such professional development leave shall immediately cease effective on the date that the new employment commences and no further compensation for professional development leave will be owed. An approved outside activity will not constitute employment for the purposes of this Section. At the conclusion of professional development leave Dr. Genshaft may transfer to a full-time 9-month faculty position or administrative position as a tenured Full Professor in the College of Education with her rate of compensation then in effect converted to a 9-month salary and adjusted as provided by USF System Regulation 10.103.
- 3.3 On or before August 15, 2018, the President shall provide the Board Chair with a list of proposed goals and objectives based upon the University's strategic plan. Once approved by the Board Chair the proposed list of goals and objectives shall be submitted by the President to the Governance Committee of the Board of

Trustees for consideration. Following consideration by the Governance Committee, the proposed goals and objectives shall be presented for review and approval by the Board in a special or regularly scheduled Board meeting.

- 3.4 On or before September 30, 2018, the President shall initiate the evaluation process for the period that began on July 1, 2017 and ended on June 30, 2018 by submitting to the Board Chair and Governance Committee a self-appraisal of her performance during said period. This appraisal shall address performance related to each of the goals and objectives determined for July 1, 2017 through June 30, 2018. At a special or regularly scheduled Board meeting after the President has submitted this self-appraisal the Board shall evaluate Dr. Genshaft's performance for the July 1, 2017 through June 30, 2018 period based on her achievement of the mutually agreed upon specified goals and objectives and other mutually agreed criteria. To aid the Board in its performance review, the President agrees to furnish such oral and written reports as may be requested by the Board Chair or Governance Committee Chair. The President shall be eligible to receive a discretionary performance based compensation for the period from July 1, 2017 to June 30, 2018. Said performance based compensation shall be determined and awarded by the Board of Trustees in a special or regularly scheduled meeting no later than December 15, 2018 and determined pursuant to the Prior Agreement(i.e. section 5.2 of the March 30, 2017 -Employment Agreement).
- 3.5 The effectiveness of this Agreement is contingent upon Dr. Genshaft being employed by the University on June 30, 2018. If Dr. Genshaft is not so employed on June 30, 2018, this Agreement shall be of no force or effect.

4.0 Compensation: Base Salary and Benefits

- 4.1 As compensation for the services to be performed by Dr. Genshaft pursuant to this Agreement the Board shall pay the President an initial base salary of five hundred and five thousand eight hundred and thirty seven dollars and zero cents (\$505,837.00). No more of this amount than is allowed by Florida Statutes shall be paid from public funds. This amount shall be payable according to the pay plan for administrative faculty employees with appropriate deductions for taxes and benefits.
- 4.2 The President's salary shall be reviewed annually and may be increased, but not decreased, at the discretion of the Board. Such annual salary review will be accomplished in conjunction with the Board's evaluation of job performance, as set forth in Section 3.4 of this Agreement.
- 4.3 The President shall be responsible for any personal income tax liability incurred as a result of this Agreement or any provision herein.
- 4.4 The Board authorizes all standard employment benefits for the President, based on her annual base salary as set forth in Section 4.1 of this Agreement.

5.0 Additional Compensation and Benefits

- 5.1 The Board authorizes the USF Foundation to contribute to an annuity for the President's benefit equal to in an amount not exceeding twenty percent (20%) of her then current annual base salary per contract year. This additional compensation

shall be treated as deferred compensation in accordance with and as allowed by applicable tax laws and regulations.

- 5.2 The President shall be eligible to receive a discretionary annual performance based compensation for the period from July 1, 2018 to June 30, 2019. Said performance based compensation shall be determined and awarded by the Board of Trustees in a special or regularly scheduled meeting no later than December 15, 2018. The President's entitlement to said performance based compensation, if and to the extent awarded by the Board, shall survive the termination of this Agreement. Seventy (70) % of the performance based compensation shall be awarded by the Board based upon the President's performance with respect to the goals and objectives determined and fixed pursuant to the provisions of Section 3.3 of this Agreement taking into account the Governance Committee's evaluation thereof. The remaining percentage of the performance based compensation shall be within the sole discretion of the Board Chair. The Board Chair, upon consultation with the Governance Committee Chair, shall also determine the weighting to be accorded to each goal and objective for the purposes of determining the annual performance based compensation for the President. Said performance based compensation shall not exceed not exceed three hundred thousand dollars and zero cents (\$300,000.00).

6.0 Use of State-owned Facility

- 6.1 The Board will authorize and provide a facility, either Lifsey House or some other comparable facility, to the President to enable her to carry out her duties more efficiently, including its use for official University functions, meetings with faculty, staff, students, and community leaders and for official entertainment.

7.0 Automobile

7.1 The University shall provide the President with a monthly automobile allowance of nine hundred and eighty eight dollars (\$988.00) suitable for her role as President.

7.2 The Board will authorize and provide insurance for the President's automobile in an amount not to be less than current property and casualty insurance package limits to the President. The President and other approved drivers shall be named insureds.

8.0 Professional Dues and Meetings

8.1 The Board will authorize and provide annually for reasonable expenses incurred by the President to attend University-related events, educational conferences, conventions, courses, seminars, and other similar professional growth activities, including membership in professional organizations.

9.0 Entertainment and Travel

9.1 The Board will authorize and provide for reasonable expenses incurred by the President for University-related entertainment and travel.

9.2 To further enable the President to carry out her duties, the Board shall provide the cost of annual dues and membership fees in the Tampa Palms Country Club and the University Club.

10.0 Memberships in Service Organizations

10.1 The Board will authorize and provide the President with membership dues or fees for organizations that would further the interests of the University.

11.0 Expense Receipts and Documentation

- 11.1 The President agrees to maintain and furnish to the Board Chair or his/her designee an accounting of expenses provided for in this Agreement in reasonable detail on no less than an every six (6) month basis.

12.0 Termination of the Agreement for Cause

- 12.1 Notwithstanding anything in this Agreement to the contrary, the parties agree that the Board may terminate this Agreement at any time for Cause. For purposes of this Agreement, "Cause" shall mean conduct reasonably determined by a majority of the Board of Trustees to be: (a) malfeasance or gross negligence by the President in the performance of her duties; or (b) actions or omissions by the President that are undertaken or omitted and are criminal or fraudulent or involve material dishonesty or moral turpitude; or (c) the indictment of the President in a court of law for any felony, or any other crime involving misuse or misappropriation of University resources; or (d) misconduct connected with work; or (e) a material breach of this Agreement that damages the University. In the event this Agreement is terminated for Cause, Dr. Genshaft's employment as President shall cease immediately, and she shall not be entitled to any further employment. In addition, she shall not be entitled to any further compensation or benefits as President, except as set forth in the University's benefit plans with respect to vested rights and rights after termination of employment.

13.0 Termination of the Agreement Without Cause

- 13.1 Notwithstanding anything herein to the contrary, the parties agree that the Board may terminate this Agreement without cause at any time upon the lesser of: (i) 90 days; or (ii) the number of days remaining in the then current term of the President's

employment prior written notice ("Notice Period") to the President. During the Notice Period compensation will be paid to the President in accordance with the provisions of Section 15 as authorized by this Agreement. The provisions of Section 3.2 hereof shall be applicable in the event of a termination pursuant to the provisions this section. Termination of this Agreement by virtue of the President's permanent disability or death shall not be construed as termination without cause.

14.0 Termination Due to President's Death or Permanent Disability

- 14.1 The President's death or permanent disability prior to the expiration of this Agreement shall terminate this Agreement, subject to the provisions of this Section.
- 14.2 In the event of the President's death while she is the President of the University, the President's Base Salary shall cease immediately and this Agreement shall terminate effective on the date of death. The President's estate shall be entitled to receive all benefits to which she is entitled under the University's various insurance plans and this Agreement.
- 14.3 If the President becomes permanently disabled during her service as President, this Agreement shall terminate effective on the date of permanent disability and she shall receive all benefits to which she is entitled pursuant to the University's disability insurance plan. Her annual base salary and benefits hereunder shall continue until such time as the long term disability insurance policy or policies purchased by the University and/or the USF Foundation begin to pay her benefits. For purposes of this Agreement, "Permanent Disability" shall mean the inability of the President to perform the essential functions of the job for a period of six (6) months in any one (1) year period, with or without "reasonable accommodations"

as such term is defined in 42 U.S.C. §12111 (9) as amended and interpreted by courts of competent jurisdiction.

15.0 Compensation During Notice Period

- 15.1 If the Board terminates this Agreement without cause pursuant to Section 13.0 of this Agreement and the President continues her service as President during the Notice Period, the Board shall pay the President compensation as authorized by Sections 4.0 and 5.0 of this Agreement for her service as President during the Notice Period.
- 15.2 The President will be entitled to continue the health insurance plan and life insurance at the President's expense upon separation from employment with the University in accordance with applicable federal law, specifically COBRA. She will not be entitled to any other benefits except as otherwise provided or required by applicable law. In no event shall the Board be liable for the loss of any business opportunities or any other benefits or income from any sources that may result from the Board's termination of this Agreement without cause.
- 15.3 If the President accepts full-time employment with an employer other than the University during the Notice Period provided for in Section 13.1, the Board's financial obligations under this Agreement (other than pursuant to Section 15.2 hereof) shall cease.

16.0 Resignation by the President

- 16.1 This Agreement may be terminated by the President by her giving the Board the lesser of: (i) ninety (90) days; or (ii) the number of days remaining in the then

current term of the President's employment advance written notice of her resignation as President of the University.

- 16.2 If the President exercises this provision, her employment as President shall cease on the effective date of her resignation and her salary and benefits as President shall cease upon termination of this Agreement.

17.0 Dispute Resolution

- 17.1 The Board and Dr. Genshaft agree that if any dispute arises concerning this Agreement that they will first attempt in good faith to resolve the dispute to their mutual satisfaction. If they are unable to do so, the parties agree that any controversy or claim that either party may have against the other arising out of or relating to the construction, application or enforcement of this Agreement, as well as any controversy or claim based upon the alleged breach of any legal right relating to or arising from Dr. Genshaft's employment and/or termination of her employment shall be submitted to non-binding mediation. Within fifteen (15) days after delivery of a written notice of request for mediation from one party to the other, the dispute shall be submitted to a single mediator chosen by the parties in Tampa, Florida. The costs and fees associated with mediation shall be borne by the University. The parties agree to pay their own attorney's fees and costs. The University and Dr. Genshaft will use their best efforts to keep any disputes and any efforts to resolve disputes confidential, informing only their respective legal counsel and other persons who have a good faith need to know basis to receive the disclosed information (Dr. Genshaft's spouse will be deemed to have a need to know any information disclosed to him) and will use their best efforts to ensure that

such persons do not further disclose any such information. The University and Dr. Genshaft agree that no mediator may be a University faculty member or have any material ongoing relationship with the University.

- 17.2 If mediation, as described in Section 17.1, is unsuccessful, any controversy between the University and Dr. Genshaft involving the construction, application or enforcement of this Agreement, as well as any controversy or claim based upon the alleged breach of any legal right relating to or arising from Dr. Genshaft's employment and/or termination of her employment shall, on the written request of either party served on the other, be submitted to binding arbitration before a single arbitrator. The American Arbitration Association shall provide a list of three arbitrators who are National Academy of Arbitration members. Within ten (10) days of receipt thereof, each party shall strike one name from the list, The President shall strike first and notify the University of such choice and the University shall strike last. Notwithstanding the foregoing the parties may mutually agree upon a qualified arbitrator or upon a mutually agreed upon neutral to select the arbitrator for them. Dr. Genshaft and the University stipulate and agree that any arbitration will be held in Tampa, Florida, pursuant to the Employment Arbitration Rules and Mediation Procedures of the American Arbitration Association (or any comparable rules then in existence) (the "Rules"). Pursuant to the Rules, discovery may include depositions, interrogatories and document production. In any controversy between the University and Dr. Genshaft involving the construction, application or enforcement of this Agreement, the arbitrator must base his/her decision upon the written Agreement and he/she shall not have power to modify, add to or ignore

terms of the Agreement. The written decision of the arbitrator shall be final and conclusive upon both parties and may be entered in any court having jurisdiction thereof. Arbitrator compensation and administrative fees shall be borne equally by the parties. The parties agree to pay their own attorney's fees and costs.

18.0 Notice

18.1 Unless and until changed by a party giving written notice to the other, the addresses below shall be the addresses to which all notices required or allowed by this Agreement shall be sent:

If to the University:

Chair, USF Board of Trustees
4202 East Fowler Avenue, CGS 401
Tampa, Florida 33620

With a copy to:

Office of the General Counsel
4202 E. Fowler Avenue, CGC 301
Tampa, Florida 33620

If to the President:

Dr. Judy L. Genshaft
4202 East Fowler Avenue, CGS 401
Tampa, Florida 33620

With a copy to:

Amelia M. Campbell
Hill, Ward & Henderson
101 East Kennedy Blvd.
Suite 3700
Tampa, FL 33602

19.0 Entire Agreement; Modification

19.1 This Agreement constitutes the entire understanding of the parties and supersedes any and all prior or contemporaneous representations or agreements as of the Effective Date, whether written or oral, including the Prior Agreement, between the parties. There are no other promises, understandings, obligations, inducements, undertakings, or considerations between the parties or owed by either party to the other that are not set forth in this Agreement or explicitly referenced herein.).

19.2 This Agreement cannot be amended, modified or changed other than by express written agreement by the parties hereto.

20.0 Severability

20.1 The terms of this Agreement are severable, meaning that if any term or provision is declared by a court of competent jurisdiction to be illegal, void, or unenforceable, the remainder of the provisions shall continue to be valid and enforceable to the extent possible.

21.0 Governing Law and Venue

21.1 This Agreement shall be interpreted and construed in accordance with the laws of the State of Florida.

21.2 Venue for any action seeking enforcement of an order pursuant to Section 17.2 of this Agreement shall be in Hillsborough County, Florida.

22.0 Understanding of the Agreement

22.1 Both parties represent that they have thoroughly read this Agreement, that they have had full opportunity to consult with legal counsel of their choice and that they understand it to be a binding contract, that they understand each provision, term, and condition of this Agreement as well as its legal effect, and that they have signed

the Agreement voluntarily and of their own free will with the intention to comply with its terms.

23.0 Public Disclosure of the Agreement

23.1 Both parties agree and acknowledge that this Agreement may be subject to the Florida public records law, Chapter 119, or other provisions, and may, therefore, be subject to disclosure by and in the manner provided for by law.

24.0 Waiver

24.1 No delay or failure to enforce any provision of this Agreement shall constitute a waiver or limitation of rights enforceable under this Agreement.

25.0 Assignability

25.1 This Agreement is not assignable, but shall be binding upon the heirs, administrators, personal representatives, successors, and assigns of both parties.

26.0 Counterparts

26.1 This Agreement may be executed in one or more counterparts, each of which shall be deemed an original but all of which shall constitute one and the same instrument.

27.0 Insurance and Indemnification

27.1 The President shall be protected by indemnification agreements on the same terms and conditions enjoyed by Trustees and University employees, said coverage to survive termination as to matters relating to her presidency.

28.0 No Trust Fund

28.1 Nothing contained in this Agreement and no action taken pursuant to the provisions of this Agreement shall create or be construed to create a trust of any kind. To the

extent that the President acquires a right to receive payments from the University hereunder, such rights shall be no greater than the right of any unsecured, general creditor of the University.

29.0 Miscellaneous

29.1 The headings in this Agreement are for convenience only and shall not be used in construing or interpreting this Agreement. The terms "Board," "Board of Trustees" and "University" as used herein, where applicable or appropriate, shall be deemed to include or refer to any duly authorized board, committee, officer, or employee of said entity. Whenever the context requires, the masculine shall include the feminine and neuter, the singular shall include the plural, and conversely.

REMAINDER OF PAGE INTENTIONALLY LEFT BLANK.

IN WITNESS WHEREOF, the President and the authorized representative of the University of South Florida Board of Trustees have executed this Agreement on this ____ day of March 2018.

WITNESS:

UNIVERSITY OF SOUTH FLORIDA

By: _____
Brian D. Lamb (Date)
Chair, USF Board of Trustees

WITNESS:

By: _____
Judy L. Genshaft, Ph.D. (Date)
President & CEO

**Historical Record at USF
Dr. Judy Genshaft**

Hired July 1, 2000 under the Board of Regents structure by the SUS Chancellor Adam Herbert.

2001 – Board of Trustees established

2002 – Board of Trustees re-established under Constitutional Amendment

January 6, 2003	5 year contract signed effective December 1, 2002 – November 20, 2007
May 15, 2007	5 year contract signed effective July 1, 2007 – June 30, 2012
May 12, 2011	5 year contract signed effective July 1, 2011 – June 30, 2016 (Board negotiated contract a year in advance of expiration date) Last outside consultant presidential salary review occurred 2011.
March 3, 2016	1 year contract signed effective July 1, 2016 – June 30, 2017
March 9, 2017	1 year contract signed effective July 1, 2017- June 30, 2018

New contract currently being negotiated. 1-year contract upon approval will be effective July 1, 2018 – June 30, 2019.

President Genshaft's Evaluations for Current Contract

	<u>SALARY</u>	<u>PERFORMANCE BASED STIPEND</u>
		<u>AWARDED</u>
12/12	\$470,000	\$172,375
12/13	\$470,000	\$172,375
12/14	\$470,000	\$168,875
12/15	\$470,000	\$175,000
12/16	\$470,000	\$168,000
12/17	\$493,500	\$263,175
12/18	\$505,873	TBD

Plus each year the President receives deferred compensation equal to 20% of salary. The USF Foundation contributes to an annuity for these payments.

NOTE: Only \$200,000 of total compensation for President comes from E&G funds.

Performance based stipend for current contract (2017-18) allows for up to \$300,000. Contract determines breakdown: 70% governance committee awards based on goals and evaluation; 30% is at the Chair's discretion (determined after consulting with the SUS Chancellor, BOG Chair and other members, local and state leaders)

Standard benefits provided include: automobile stipend (President chose to purchase her automobile therefore she receives a stipend to cover expenses; automobile insurance; professional dues and expenses; annual dues and membership fees at Tampa Palm Country Club and University Club; and university-related entertainment and travel. *President Genshaft chose not to live in the university-owned Lifsey House therefore she receives no housing allowance. The various benefits provided in Dr. Genshaft's contract are relatively standard for university presidents.

SUS Comparison:

		<u>Pav Component</u>	<u>Annual Value</u>	<u>Comments</u>
University of Florida Enrollment: 54,854 Research Expenditures: \$791M AAU/FL Preeminence	President Fuchs	Base Salary	\$872,900	<i>Retention for each year served</i> <i>Retirement for each year served</i> <i>4% increase if meets short term goals and shows progress toward its long term goals; 3% if only meeting 75% of short term goals (Pres. requested receiving %s based on faculty raises 1.5% & 3% therefore his base is less than what contract says per UF HR)</i> <i>1-year salary of base for last year of contract (cash payment ok)</i> <i>5-year Contract (2014-2019)</i>
	Hired in 2014	Deferred Comp.	\$160,000	
		Deferred Comp.	\$150,000	
		Performance	3 or 4% of base	
		Prof. Development		

University of Florida has 1 campus in Gainesville and single accreditation.

Florida State University Enrollment: 41,900 Research Expenditures: @\$200M FL Preeminence	President Thrasher	Base Salary	\$566,487	<i>Retention (\$400k at 5 years original contract '19)</i> <i>25% total salary</i> <i>Retirement – state plan</i> <i>Capital Campaign Performance Goals</i> <i>1-year salary of base for last year of contract</i> <i>5-year + extended by 1 year Contract (2014-2020)</i>
	Hired in 2014	Deferred Comp.	\$80,000	
		Deferred Comp.	\$130,302	
		Deferred Stipend	\$17,500	
		Performance	\$200,000	
	Prof. Development			

Florida State University has the main campus in Tallahassee; 2 regional campuses in Florida; 7 medical sites for 3rd/4th year students around Florida; 4 international sites with single accreditation.

University of Central Florida Enrollment: 64,335 Research Expenditures: \$145M FL Emerging Preeminence	John Hitt	Base Salary	\$505,739	<i>20% total compensation - annuity</i> <i>Retirement – state plan</i> <i>Maximum value awarded for 2011-14 (3-year goal stipend)</i> <i>1-year at \$260,000 salary plus requirement to return for 1 year upon completion of sabbatical or return salary</i> <i>Annual Contract (2017-2018) RETIRING 6/30/18 - Search ongoing...no public salary notices</i>
	Hired in 1992	Deferred Comp.	\$101,146	
		Deferred Comp.	\$17,500	
		Performance	\$164,475	
		Prof Development		

NOTE: during the 2016-17 year, President Hitt received a \$491k retention stipend.

University of Central Florida has the main campus in Orlando; 10 regional campuses/sites in Florida with single accreditation.

Board of Trustees Meeting - New Business - Action Items

University of South Florida Enrollment: 50,577 Research Expenditures: \$515M FL Preeminence	Judy Genshaft	Base Salary	\$505,873	2017-18 contract
	Hired in 2000	Deferred Comp.	\$101,174	20% of salary per 2017-18 contract
		Deferred Comp.	\$17,500	Retirement – state plan
		Performance	\$275,000	Awarded up to \$300,000 based on annual evaluation
		Prof. Development		1-year salary of base for last year of contract

Annual Contract (2017-2018)

NOTE: during the 2016-17 year, President Genshaft received her \$500k retention stipend from her 5 year contract that ended June 30, 2016...

Proposed and recommended by Gov. Comm.

Base Salary	\$505,873	If approved – for 2018-19 contract
Performance	\$300,000 up to	Award up to \$300,000 based on annual evaluation (current)
Deferred Comp.	\$101,174	20% of base salary (current)
Deferred Comp.	\$17,500	Retirement – state plan
Prof. Development		1-year salary of for last year of contract

Annual Contract (2018-2019)

University of South Florida has the main accredited institution in Tampa; 2 separately accredited regional institutions in Florida.

2018-2019 President's Contract

**July 1, 2018-June 30, 2019 Employment
Agreement**

**Governance Committee recommends approval
with no substantive changes**

**Governance Committee recommends Board Chair
is authorized to finalize contract after BOG
ratification and has the ability to make any
technical changes, if needed.**



Agenda Item: FL 113

USF Board of Trustees March 6, 2018

Issue: Appointment of USF St. Petersburg Campus Board Member

Proposed action: Approve USF St. Petersburg Campus Board Member

Background information:

The Board shall appoint members to the Campus Boards, from recommendation of the President. Consonant with the State Constitution, members shall hold no other State office. Members may be reappointed for additional terms not to exceed eight (8) years of service.

The USF Regional Campus Boards have the powers and duties provided by law and other such powers as are lawfully delegated by the University Board of Trustees to provide for efficient operation and improvement of the campus. It is within the authority of the Board of Trustees to appoint the members of the USF Regional Campus Boards.

Mrs. Susan Hamilton Churuti is the director of Beach Drive Retail Inc., an affiliate of Hamilton Partnership LTD, of which Mrs. Churuti is partner. Together these entities manage and own Parkshore Plaza and 400 Beach Drive, two urban, mixed-use, high-rise developments on the waterfront in downtown St. Petersburg which total more 50,000 square feet of retail space.

Previously Mrs. Churuti was the co-chair of law firm Bryant Miller Olive's State and Local Government Practice Group and served in the Pinellas County Attorney's Office for over twenty years as county attorney. Mrs. Churuti has broad experience representing the county and its constitutional officers and her expertise includes U.S. and state constitutional law, legislation, charters, eminent domain, elections, risk management, public construction, public finance, utilities, and procurement, as well as litigation and appellate practice. She is proficient in board representation, serving as general counsel for more than 50 boards, commissions, and special districts.

Mrs. Churuti is also an active community volunteer serving on the board of directors for the Kiwanis Club of St. Petersburg and Peterborough Apartments Inc., a housing entity that provides for elderly and handicapped persons at low costs.

Mrs. Churuti is eligible for a four year appointment ending June 30, 2022.

Supporting Documentation: None

Prepared by: Travis Miller

Agenda Item: FL 114

USF Board of Trustees
March 6, 2018

Issue: Donor Bequest

Proposed action: Approve donor bequest for the College of The Arts

Executive Summary:

A planned gift totaling \$296,377.28 was realized from the William Kidd Trust. The trust stated the following:

One-half (1/2) thereof to USF Foundation, Inc., for the use and benefit of the University of South Florida, to be used within the College of Visual and Performing Arts as the Board of Trustees or other governing body of said University shall deem proper.

The Dean of the College of The Arts has recommended the funds be split as follows:

\$250,000 will establish the Dean's Endowed Fund to support strategic initiatives at the College, as determined by the Dean or his/her assigns.

\$46,377.28 will be assigned to the Dean's Operating Fund for more immediate general use.

Strategic Goal(s) Item Supports: Goal 4: sound financial management

BOT Committee Review Date: None

Supporting Documentation Online (please circle): Yes No

[USF Foundation Memo](#)

USF System or Institution specific: USF College of The Arts

Prepared by: Travis Miller



BOARD OF TRUSTEES
23 JAN '18 PM 12:22

MEMORANDUM

RECEIVED

Date: January 22, 2018

To: Cindy Visot

From: Joel Mombreg 

CC: Noreen Segrest

RE: Board Approval for Donor Bequest

I write to request approval of the Board of Trustees regarding the use of a planned gift in the amount of \$296,377.28 which was as realized recently from the William Kidd Trust. The trust stated the following:

One-half (1/2) thereof to USF Foundation, Inc., for the use and benefit of the University of South Florida, to be used within the College of Visual and Performing Arts as the Board of Trustees or other governing body of said University shall deem proper.

The Dean of the College of the Arts has recommended that the funds be split as follows:

- (1) \$250,000 will establish the new **Dean's Endowed Fund**, to support strategic initiatives at the College of The Arts, as determined by the Dean of the College or his/her assigns.
- (2) The remainder (\$46,000 and change) to the existing **Dean's Operating Fund (230060)** for more immediate general use.

Thank you for your consideration.

USF SYSTEM

Tampa

PERFORMANCE UPDATE

USF BOARD OF TRUSTEES

Judy Genshaft
March 6, 2018



Student Access & Success

Update on Future New Student Recruitment Strategy

- Collaborating with student organizations to connect prospects to under-represented student groups.
- USF ranks 3rd nationally for graduate student volunteers serving in the Peace Corps and 19th among large colleges and universities for total undergraduate students serving in Peace Corps (2018).
- Hosted the 1st National Student Success Conference last month.
- Selected by *NCHEMS* to mentor three universities in the Foundations for Student Success initiative to promote college completion for under-represented minorities.



Academic Programs

- **New Degree Pre-Proposals in Development (AY 17/18):**
 - 52.0804 Personal Finance (Bachelors)
 - 11.0104 Informatics (Doctoral) - STEM



Research - Commercialization

- **Utility patents awarded (over three calendar years)*:**
 - 2014-2016: 314
 - 2015-2017 Plan: 273
 - 2015-2017: 324 (Updated since 12/31/17)

**Preeminence metric*



Facilities – Projects Over \$2M

Project	Funded	Budget	Scope	Schedule
Morsani College of Med. & Heart Inst.	Y	●	●	●
"The Village" – Residence Life	Y	●	●	●
Grocery – Publix	Y	●	●	●
Laurel Drive Extension/New Entry	Y	●	●	●
Holly Renovations (C, D, G)	Y	●	●	●
Replace Cooling Tower #5	Y	●	●	●
USF Honors College	N	●	●	●
USF Football Center	N	●	●	●



Leadership Talent

Critical hires:

- *Professor Ruthann Atchley, Associate Vice President, Community Engagement (U of Kansas)*
- *Professor Kami Kim, Internal Medicine (Albert Einstein College of Medicine)*
- *Professor & Dean Charles Knoepfel, College of Education (Clemson University)*
- *Professor Xin Zhang, Molecular Pharmacology & Physiology (University of Oklahoma)*
- *Assistant Vice President, Resource Management and Development, Betty Viamontes, Student Affairs and Student Success*
- *Registrar, Catherine Mund (Howard Community College, Maryland)*



General

Next 90-day Strategic Priorities:

- Fundraising & Financial Feasibility Studies for Stadium
- Branding Plan
- 2017-18 legislative session outcome planning

Success stories/institutional highlight:

- Ranked **1st** in Florida and **3rd** in the U.S. for the 3rd year in a row, with **25** USF teams selected for the national **NSF Innovation Corps** program
- U.S. News and World Report's 2018 Best Online Program rankings: graduate engineering **No. 21**, graduate computer information technology **No. 23**, graduate education program **No. 46**



USF SYSTEM

St. Petersburg

PERFORMANCE UPDATE

USF BOARD OF TRUSTEES

Martin Tadlock
March 6, 2018



Student Access

New Student Recruitment Strategy:

- Student Experience Program
- Emerging Scholars Program
- Regional Chancellor's Leadership Council

Student Success

Points of Pride:

- Fall to fall APR increased by 10 percentage points.
- New class schedule effective May 2018 will maximize USFSP students' ability to plan their schedules for completion within four years.
- USFSP launched Archivum with upwards of 70+ users from across the institution. New referral link is live and faculty are now able to send referrals through Canvas. We have already seen improved collaboration and communication between departments.

Academic Programs

Progress of new programs:

- Full proposals submitted for new degrees in Sustainability Studies (STEM) and Computational Analysis & Applied Mathematics (STEM).
- Pre-proposals submitted for: General Studies (Supports Complete Florida); Environmental Chemistry (STEM) and Management Science (STEM).
- Working with USFSM on a Hospitality Program.

Program reviews and accreditation:

- KTCOB completed its external accreditation. Final recommendation expected in April.
- Response to USFSP 5th Year Interim Report to SASCOC will be submitted in April.

Research - Funding

Points of Pride:

- USFSP continues to see growth in the numbers of research proposals and funds awarded.
 - USFSP's federal research expenditures reached an all-time high of just over \$4.5 million.
 - Annual awards, both private and federal, for FY 16-17 also reached a new high of approximately \$5 million.
 - Hired a full-time employee to help increase post-award support at USFSP.
 - Monthly meetings with researchers to discuss how to support research and remove barriers to conducting research at USFSP.

Fundraising

- **Total Pledges/gifts received against prior year and plan:**
 - FY 2017 Actual: \$3,272,439
 - FY 2018 Plan: \$3,000,000
 - FY 2018 (through 2/24/18): \$926,484
 - Number of Donors for FY 2018 (through 2/24/18): 330
- **Major Gifts received (>\$100,000):**
 - FY 2018 (through 2/24/18): 2 Donors
- **Endowment against prior year and plan:**
 - FY 2017 Actual: \$16,595,131.31
 - FY 2018 (through 12/31/17): \$18,308,858.40

Facilities - St. Petersburg

Project	Funded	Budget	Scope	Schedule
P3 Housing – Residence Life	Y (Developer)	●	●	●
Harbor Hall Re-roof & HVAC	Y (E&G)	●	●	●
Waterfront Bldgs/Site - Master Plan	Y (E&G)		●	●
New HVAC – Library/Davis/Coquina	Y (Carry forward)	●	●	●
Davis Hall Renovation	Y (PECO)	●	●	



General

90-day priorities: *(tied to strategic plan/work plan goals)*

- Move P3 initiative toward BOG approval

Success stories/institutional highlights:

- \$500K Grant for Wealth Management Center and Financial Literacy Initiatives
- Unveiling of La Florida with Spanish Embassy
- Largest turnout for 6th Annual St. Petersburg Conference on World Affairs
- USFSP Student Samantha Billet is the recipient of WEDU Be More Inspiring, Rising Star Award
- New Library roof incorporates artificial habitat for threatened Least Tern

USF SYSTEM

Sarasota-Manatee

PERFORMANCE UPDATE

USF BOARD OF TRUSTEES

Dr. Karen Holbrook
March 6, 2018



Student Access

- Enrollment Management Plan implementation
- New Admissions CRM system
- Articulation for current students
 - LECOM, Stetson Law, USF Nursing & Engineering
- Virtual/Online Graduate information sessions



Student Success

- Career Success Speaker Series
- County Career Connections
- Fall to Spring retention - FTIC
- Green to Gold success workshop series
- Internship growth
 - +22% 2016-17 318; 2017-18 408
- Leadership Series for Women
- Persistence Committee/ Persistence Advisors
- Spring Career Week – workshops, speakers and networking



Academic Programs

In development 2017-18

- Bachelor's Degree in Risk Management Insurance (proposal approved)
- Bachelor's Degree in Management Science (preproposal approved)
- Master's Degree in Biology (preproposal in process)
- Bachelor's of Science in Cybersecurity & Information Technology (Fall 2018)

Program reviews and accreditation 2017-18

- Program Review: English
- Accreditation: AACSB – January 2018 Site Visit; March/April approval

Other

- 4 + 1 articulation in Education with New College (MAT-EE)



Research

- Inaugural USFSM internal awards program
- “Research USFSM” – spring release of the magazine
- Research workshops and events

Predatory Publishing

NSF Grant Writing

Pecha Kucha

Research Integrity & Compliance

Student Showcase for Projects,
Research, and Innovation

Research Productivity

Sci/Val/Scopus

Student Research Engagement

- Competitive Grant Submissions and Awards

	2016	2017	2018 - TD
Submissions	755,948	1,210,877	4,952,927
Awards	19,420	454,197	103,750



Fundraising

- **Total pledges/gifts received against prior year and plan:**
 - 2016-17 Goal: \$2,150,000 Secured : \$1,616,642
 - 2017-18 Goal: \$3,000,000 Secured (to date): \$ 521,292
- **Major gifts received (>\$100,000):**
 - One 7 figure gift discussion underway
 - Three 6 figure gift discussions underway
 - Three 5 figure solicitations under consideration
- **Endowment against prior year and plan:**

Principal Value

 - 2016-17 (P/E June 2017): \$8,430,818
 - 2017-18 (P/E December 2017): \$8,432,818
- ***Strategic Priority Areas for Advancement***
 - Scholarships
 - STEM Building
 - Rowing



Facilities – Sarasota-Manatee

Progress update on approved new facilities/construction:

Project	Funded	Budget	Scope	Schedule
CHTL Expansion/Addition	Y (E&G)	●	●	●
Capital Improvement Trust Fund Proj.	Y (CITF)	●		
Academic STEM Facility	N (PECO)	●	●	
Utilities/Infrastructure/Cap Renewal	N (PECO)	●	●	



Leadership Talent

- **Critical hires (including VCs, Deans):**
 - Regional Vice Chancellor Advancement
 - Director, Communications and Marketing
- **Current searches**
 - Regional Vice Chancellor for Academic Affairs
 - 92 applications
 - Review began March 1



General

- **90-day priorities: (*tied to strategic plan/work plan goals*)**
 - P3 planning for residence hall
 - Science Research and Technology building revisioning
- **Success stories/institutional highlight**
 - Annual student survey shows an increase in school pride, growth and development, and overall satisfaction
 - “Cuba and the Caribbean: What Now?”
 - Emphasis on community outreach
 - First Winter session – 6 courses, 143 students
 - Increased CCA activity

