



USF Board of Trustees

Tuesday, December 3, 2019
USF Marshall Student Center Ballroom
9:30 AM – 12:30 PM

A G E N D A

I. Call to Order and Comments Chair Jordan Zimmerman

II. President’s Update President Steve Currall

III. New Business – Action Items (Minutes and Consent)

a. FL 101 – Approval of Minutes Chair Zimmerman

- 1. [September 10, 2019](#)
- 2. [October 28, 2019](#)

b. Consent Agenda (FL 102 – FL 115) Chair Zimmerman

(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.

Joint Consolidation, Accreditation & Preeminence Committee and Strategic Initiatives Committee Approved Items

FL 102 – [Approval of “One USF” Mission and Goals as amended](#)

Governance Committee Approved Items

FL 103 – [Approval of Revisions to USF Board of Trustees Operating Procedures](#)

FL 104 – [Approval of Revisions of USF Health Professionals Conferencing Corporation Articles of Incorporation and By-Laws](#)

FL 105 – [Approval of Direct Support Organization Board Members – USF Health Professions Conferencing Corporation Board of Directors](#)

FL 106 – [Approval of Direct Support Organization Board Members – USF Research Foundation](#)

FL 107 – Approval of Direct Support Organization Board Members – USF Institute of Applied Engineering

Finance Committee Approved Items

FL 108 – Approval of 2020-21 USF Parking System Budget

Academics and Campus Environment Committee Approved Items

FL 109 – Approval of Tenure as a Condition of Employment (USF Health)

FL 110 – Approval of Degree Program Productivity Report and Proposed Terminations

FL 111 – Approval of Proposed B.S. Cell and Molecular Biology

FL 112 – Approval of Proposed B.S. Information Science

FL 113 – Approval of Proposed B.S. Marine Biology

FL 114 – Approval of Proposed M.S. Marriage and Family Therapy

FL 115 – Approval of Proposed B.S. Personal Financial Planning

c. New Business – Action Items

FL 116 – Approval of Resolution indicating alignment of the SACSCOC Substantive Change Prospectus with the BOT-approved Guiding Principles President Currall

FL 117 – Approval of USF St. Petersburg Campus Board Appointment President Currall

FL 118 – Approval of Chair Emeritus Title Vice Chair Les Muma

IV. BOT Roundtable Discussion & Recognition Chair Zimmerman

V. Adjournment Chair Zimmerman

University of South Florida
Board of Trustees Regular Meeting
September 10, 2019
Unofficial Minutes

Chair Jordan Zimmerman convened the regular meeting of the USF Board of Trustees at 9:33 AM and thanked everyone for being in attendance.

Chair Zimmerman remarked on the latest of USF's rankings in US News & World Report. He congratulated and gave thanks to Provost Ralph Wilcox and the university's deans, faculty and staff who have contributed to increases in student success. He then asked Chief of Staff and Assistant Corporate Secretary Dr. Cindy Visot to call the roll.

Dr. Visot called the roll with the following trustees present:

Trustee Michael Carrere
Trustee Brittney Deas
Trustee Stephanie Goforth – not in attendance
Trustee Michael Griffin
Trustee Oscar Horton – not in attendance
Trustee Deanna Michael
Trustee Harold Mullis
Trustee Leslie Muma
Trustee John Ramil – arrived during the President's rankings update
Trustee Byron Shinn
Trustee Charles Tokarz
Trustee Nancy Watkins
Trustee Jordan Zimmerman

New Business

FL 101 – Approval of Minutes

June 6, 2019
August 16, 2019
August 19, 2019

Chair Zimmerman asked if there were any changes to the minutes that needed to be reviewed. Having none from the trustees, the Chair asked for a motion. Trustee Hal Mullis moved for approval with a second from Trustee Nancy Watkins and the minutes were approved unanimously.

President Currall Report

Chair Zimmerman called on President Steve Currall to provide an update on national rankings and consolidation.

Rankings Update

President Currall presented a PowerPoint which highlighted USF's latest ranking from US News & World Report—number 44 among public Universities, making USF America's fastest rising university. The President echoed Chair Zimmerman's comments and thanked Provost Wilcox and his leadership team, as well as all deans, faculty, staff and students for their hard work.

Consolidation Update

The President provided a PowerPoint updating the Board on the progress of consolidation with the following highlights:

- USF's competitive advantage
- Key milestones in the consolidation process
- Guiding principles for consolidation
- Preeminence and national ranking improvements
- Proposed organizational Charts
- Requirements of SACSCOC for accreditation and state law
- Next steps

Trustee Watkins commented on the Florida statues and their requirements. Trustee John Ramil commented on his visit with SACSCOC and their requirements.

President Currall made comments about being deeply committed and in compliance to both SACSCOC and state law and reminded the Board that USF's accreditation will not lapse.

Trustee Byron Shinn commented on the requirements of maintaining accreditation, the organizational charts, academic hires and academic excellence. Trustee Mike Griffin commented on the topic of collaborating with regional chancellors and how that relates to the organizational charts. Trustee Mullis had questions concerning the draft request for substantive changes that the Board will receive. Trustee Deanna Michaels commented on the support of new faculty hires.

Consent Agenda (FL 102 – FL 107)

Governance Committee Approved Items

FL 102 – Approval of BOT Operating Procedures

FL 103 – Approval of DSO Board Members for USF Institute of Applied Engineering

Academics and Campus Environment Committee Approved Items

FL 104 – Approval of Tenure as a Condition of Employment (USF Tampa)

FL 105 – Approval of Textbook Affordability Report

FL 106 – Approval of USF 2019 Florida Equity Report

FL 107 – Approval of Industrial Hemp Pilot Project

Vice Chair Les Muma reported on behalf of the Governance Committee and recommended approval of the items.

Trustee Charles Tokarz reported on behalf of the ACE Committee and recommended approval of the items.

Chair Zimmerman then asked United Faculty of Florida representative Dr. Arthur Shapiro if he had any remarks related to the agenda. Dr. Shapiro congratulated USF's students, faculty and administration on their accomplishment of increasing the national prominence of the university.

Chair Zimmerman confirmed there were no requests to remove items from the consent agenda and then asked for a motion to approve all presented consent items. Vice Chair Muma made a motion for approval with a second by Trustee Mullis. The motion was approved unanimously.

New Business – Action Items (FL 108 – FL 114)

FL 108 – Approval 2019-20 University E&G Carry forward Spending Plan and Authority for the Chairs Approval of FY 2020 Budget Certification Form

Chair Zimmerman called on Vice President and CFO Nick Trivunovich to present. Mr. Trivunovich presented a PowerPoint highlighting:

- Examples and general restrictions on use of carry forward funds
- Guidelines and reporting standards for carry forward enact this year
- Newly established forms
- USF System E&G carry forward balances
- USF System E&G carry forward plan summary proposed
- USF System E&G carry forward usage by category

Chair Zimmerman questioned the total funds available and the carry forward budget. The Chair also had questions pertaining to \$25.2 million for renovation, repairs and maintenance. Trustee Mullis had questions concerning the carry forward and E&G balances.

President Currall had questions about the annual reoccurring budget of \$650 million.

Trustee Watkins had questions concerning Faculty Research Startup Funds. Trustee Mike Carrere had questions concerning the \$240 million carry over and the \$50 million reserves. Trustee Shinn commented on the Fixed Capital Outlay Plan and the possibility of expansion for USF Sarasota-Manatee. Trustee Ramil commented on spending resources. Trustee Griffin had a question regarding student fees.

Chair Zimmerman asked for a motion to approve the item. Trustee Ramil moved for approval, with a second from Trustee Shinn. The motion was approved unanimously.

FL 109 – Fixed Capital Budget

Mr. Trivunovich presented the item and informed the Board that the procedures for capital outlay budgets remains in flux with the Board of Governors as it pertains to improvements and efficiencies, but he thanked the trustees for their patience as they work through the system. Mr. Trivunovich informed the Board that there were two different types of projects being presented for approval: ones that are currently in process in need of more funding and ones that have not yet begun. He also stated that the approval of the budget does not necessarily approve the project itself, the Board's normal expenditure approval process would be followed (over \$1 million approved by Chair Zimmerman, over \$2 million approved by the Finance Committee).

Chair Zimmerman had questions concerning the overrun on the downtown Morsani College of Medicine and Heart Institute building. Trustee Watkins had questions pertaining to the stream of revenue. Trustee Shinn had questions concerning a building that was in the developmental stage at USFSM and also had questions about housing at USFSM. Trustee Griffin had questions pertaining to parking and transportation Capital Outlay Projects. Trustee Shinn asked for an amendment as it relates to including the expended funding for the STEM building at USFSM.

Trustee Watkins commented on ratifying previously approved budget items.

Trustee Mike Carrere commented on the annual capital outlay budget, Morsani line items and approved budgets.

After the discussion between the trustees, Chair Zimmerman read the motion and asked for approval:

1. Approve fiscal year 2019-2020 Fixed Capital Outlay Budget
2. Delegate authorize the USF President to make nonmaterial changes to the budget with consultation with the Board Chair. Any material changes must be approved by the Full BOT. Nothing in this motion is exempt from the requirements of USF policy 0-1000, delegations of presidential authority (includes expenditure authority of the established powers and duties of the Board Chair.

This does not include ratification of unapproved Morsani overages.

3. Authorize the President, Board Chair and CFO to execute a certification form required by the State University System Board of Governors relating to the Fixed Capital Outlay Budget.

Trustee Mullis moved to approve with a second from Trustee Ramil and the motion was approved unanimously.

FL 110 – Approval of the Revised 2019 USF Accountability Plan

Chair Zimmerman called on Provost Ralph Wilcox to present the item. Provost Wilcox provided an overview of the 2019 USF Accountability Plan and reported that following the original presentation of accountability plans to the BOG in June 2019, a few revisions were required by the BOG, none of which were substantive in nature, nor are actual performance data being modified.

Provost Wilcox then presented a PowerPoint with the necessary revisions.

Trustee Shinn moved for approval with a second from Trustee Watkins and the motion was approved unanimously.

FL 111 – Approval of the Revised Legislative Budget (LBR) Request

Chair Zimmerman called on President Currall to present the item. President Currall provided an overview of the LBR and stated that he was recommending an update to the previous LBR approved by the Board on August 19, 2019. This is in response to the 2020-2021 LBR Development Policy Guidelines adopted by the BOG.

USF is requesting a recurring investment of new state dollars beginning in FY 2020-21 of \$50 million.

Trustee Watkins gave recognition to the BOG's vision and commented on the national recognition of all three Preeminent universities. Trustee Griffin made comments about the gap as it relates to Preeminent funding. Trustee Brittney Deas made comments concerning USF's national rankings.

Trustee Mullis moved for approval with a second from Trustee Ramil and the motion was approved unanimously.

FL 112 – Approval of USF Mission Statement and Goals (effective 7/1/20)

President Currall presented the item, an update to USF’s mission statement and goals effective July 1, 2020 for one USF geographically distributed. The President stated that this change is needed in preparation for the submission of the substantive change prospectus to SACSCOC for consolidation.

The President announced that he will be structuring a process of strategic renewal for USF, which will happen over the next 12 to 18 months.

Trustee Griffin had questions concerning inclusion of alumni and friends as it relates to the goals. Trustee Deanna Michael had questions of the mission statement and goals extending past SACSCOC submission. Trustee Watkins had questions relating to the process of the mission statement and wanted to know who was involved and who had input in the decision-making; she also suggested having a Board conference call in the future to approve before November 1.

Chair Jordan Zimmerman made comments concerning mission statements, that they should be memorable and repeatable, short and simple. Trustee Carrere remarked that the Strategic Initiatives Committee should be involved in the process of developing a mission statement and had questions concerning professional students and their inclusion in the mission statement (i.e. the difference between graduate and professional students).

Trustee Watkins made a motion to approve the mission statement and goals and to refer the motion to the Strategic Initiatives Committee. Trustee Les Muma seconded the motion. The motion was unanimously approved.

FL 113 – Approval of Naming Projects

Chair Zimmerman called on Senior Vice President for Advancement Joel Momberg to present the item.

Mr. Momberg provided background information on Nicholas Vojnovic, MBA ‘12 and his support to the USF System and Muma College of Business, including gifts and commitments of \$85,000 to support and promote the future success of USF students and the educational mission of the university. Mr. Momberg asked the Board to approve the naming of the lobby area outside the Dick Bowers Multipurpose Room in the Muma College of Business the “Nick Vojnovic MBA ‘12 Lobby” in recognition and appreciation of philanthropic support provided to this University.

Trustee Mullis made a motion to approve with a second by Trustee Watkins and the motion was approved unanimously.

FL 114 – Approval of MCOM Budget increase

Senior Vice President for Business and Financial Strategy David Lechner, Vice President and CFO Nick Trivunovich, Vice President for Administrative Services Calvin Williams and Senior Associate Vice President and CFO for USF Health Richard Sobieray presented the item.

The team presented slides showing highlights of the history of the Morsani College of Medicine, Taneja College of Pharmacy and Heart Institute Building in downtown Tampa, as well as current needs to increase the budget from the previously approved \$173 million to \$189 million. Various factors were presented to the Board that have impacted costs, including an inability to do a fixed price contract. The Board also received information on items that were not previously in budgets for the building itself but were included in the construction project overall.

A discussion occurred between members of the Board and Mrs. Lechner, Trivunovich, Williams and Sobieray. Trustee Watkins had questions concerning cost estimates and commented on the glare caused by the building's windows and the old USF logo currently on the building. Chair Zimmerman requested to see the change orders and made a suggestion to speak with the architect who designed the building concerning the glare. The Chair also made comments pertaining to fundraising in order to complete the project properly and for the Board members to receive a detailed write up of everything that is expected to be covered should the new \$189 million budget be approved.

Trustee Shinn commented on holding people accountable, as well raising the remaining money as it relates to the cost to complete the project. Trustee Carrere addressed cost-related issues and echoed other Board comments on the need for full transparency. Trustee Ramil requested an after-action review by the Board.

Chair Zimmerman made a motion to approve the cost increase of the Morsani College of Medicine, Taneja College of Pharmacy and Heart Institute Building up to \$189 million with the following conditions:

1. Management will provide a floor-by-floor breakdown to the Board of the contents of each floor within five business days of this meeting.
2. Management's representation of \$189 million will fund a fully functional Morsani College of Medicine and a research-ready and capable Heart Institute.
3. A detailed best practices and lessons learned review of the processes and decisions which have led to the shortfalls will be completed in a reasonable amount of time.
4. Management will regularly update the Board at each subsequent meeting on this project until a certificate of occupancy is issued.

The motion was seconded by Trustee Mullis and approved unanimously by the Board.

Chair Zimmerman made closing remarks and adjourned the meeting at 1:09 PM. Provost Wilcox's enrollment update was not presented.

University of South Florida
Board of Trustees Conference Call
Monday, October 28, 2019
Unofficial Minutes

Chair Jordan Zimmerman called the meeting to order at 11:30am. Chair Zimmerman thanked everyone for joining this special call of the Board of Trustees. The Chair celebrated the football team's win against ECU and stated that he was looking forward to the upcoming Board of Governors Trustee Summit hosted at the University of Florida and hoped to see as many trustees there as could make it.

Chair Zimmerman asked Assistant Corporate Secretary Dr. Cindy Visot to call the roll.

Dr. Visot called roll with the following trustees present:

Trustee Michael Carrere
Trustee Britney Deas
Trustee Stephanie Goforth
Trustee Michael Griffin
Trustee Oscar Horton—not in attendance
Trustee Deanna Michael
Trustee Harold Mullis
Trustee Leslie Muma
Trustee John Ramil
Trustee Byron Shinn
Trustee Charles Tokarz
Trustee Nancy Watkins
Trustee Jordan Zimmerman

Chair Zimmerman called on Dr. James Garey to present the agenda item.

FL 101 – Ratify the 2019-2020 CBA between USF Board of Trustees and the United Faculty of Florida

Dr. Garey, vice provost for labor relations & academic space planning, introduced the United Faculty of Florida tentative agreement on a successor Collective Bargaining Agreement (CBA). He stated that it is a contract extension but would act as a new contract. There are three changes that were made from the existing contract and he listed them as the following:

The new contract would be effective upon ratification by both parties and would expire on December 31, 2020. The majority of the contract remains *status quo* from the prior 2016-2019 CBA. Only the salary article (*Article 23*) was amended along with corresponding technical changes to the duration article (*Article 29*). The parties are satisfied that the tentative agreement is fair, addresses the interests of the faculty and provides stability through the consolidation process.

If ratified by the Board, the new CBA would provide a 1.5% base salary increase to in-unit faculty members who:

1. were rated at least satisfactory on their 2018-2019 performance evaluation; and

2. were employed in an in-unit faculty position as of August 1, 2018.

In addition, the CBA includes new discretionary authority for management to make salary adjustments for the duration of the contract not to exceed .5% of the August 7, 2018 total in-unit faculty salary base plus any unused remaining discretionary expenditure authority from the 2016-2019 CBA.

Dr. Garey stated the cost of this specific agreement will be \$2.3 million to the university in E&G funds and that the pay is not retroactive. Dr. Garey then referred to David Lechner, senior vice president for business and financial strategy, to speak on any other budgetary difference this would make for the university. Mr. Lechner stated that other salary negotiations with staff and University Police are still outstanding.

President Steve Currall stated that USF is aiming to be responsible stewards of their budget and this increase should strengthen the community before consolidation takes place. He also thanked Dr. Garey and General Counsel Gerard Solis for their active work throughout the bargaining process.

Chair Zimmerman thanked Dr. Garey, Mr. Lechner, and President Currall for their contributions and then asked for a motion. Trustee Les Muma made a motion for approval and Trustee Deanna Michael seconded the motion. The Chair then asked if there was any discussion.

Trustee Mike Carrere asked if the 1.5% increase is contingent on PBF being awarded to the university by the state. Mr. Solis responded that for this particular 16-month contract there is no contingency as funding will take place from current sources, but future years can be placed on contingency as has been previously done. Trustee Michael spoke on behalf of faculty and stated they are happy with the outcome and they are thankful for the efforts of the university and UFF.

With no further discussion Chair Zimmerman called for a vote and the motion was approved unanimously. The Chair thanked the Board for joining the call and adjourned at 11:41am.

MISSION AND GOALS FOR ONE USF GEOGRAPHICALLY DISTRIBUTED

*Approved by the
Strategic Initiatives Committee and Consolidation, Accreditation & Preeminence Committee
USF Board of Trustees*

November 20th, 2019

UNIVERSITY OF SOUTH FLORIDA MISSION STATEMENT

Led by outstanding faculty and professional staff, the University of South Florida:

- *Conducts innovative scholarship, creative activity, and basic and translational research, and*
- *Delivers a world-class educational experience promoting the success of our talented and diverse undergraduate, graduate, and professional students.*

As a public metropolitan research university, USF, in partnership with our communities, serves the people of Florida, the nation, and the world by fostering intellectual inquiry and outcomes that positively shape the future - regionally, nationally, and globally.

UNIVERSITY OF SOUTH FLORIDA GOALS

- Goal 1:** To promote the lifelong success of well-educated, highly skilled, and adaptable alumni/alumnae who lead enriched lives, are engaged citizens, and thrive in a dynamic global market.
- Goal 2:** To conduct high-impact research and innovation to advance frontiers of knowledge, solve global problems, and improve lives.
- Goal 3:** To be a major social and economic engine creating robust global, national, and regional partnerships to build a prosperous and sustainable future for our regional communities and the State of Florida.

- Goal 4:** To provide a safe, inclusive and vibrant community for learning, discovery, creative activities, and transformative experiences enabled through adaptive and integrative design of physical, social, and digital environments.
- Goal 5:** To practice continuous visionary planning and sound management throughout USF to ensure a strong and sustainable financial base, and to adapt proactively to emerging opportunities in a dynamic environment.

Both the proposed Mission Statement and Goals will be fully [re]considered as a part of the upcoming Strategic Renewal process.

**USF Board of Trustees
Governance Committee
November 20, 2019**

Issue: The primary issue addressed is the role of the Campus Boards in the consolidated USF governance structure.

Proposed action: This is an action item to approve amendments to the USF Board of Trustees Operating Procedures (“Operating Procedures”).

Executive Summary:

A governance structure that permits direct reporting to the Board of Trustees, which is independent of the USF President, is inconsistent with a single accreditation. Therefore, the Governance Committee is asked to review proposed amendments to the Operating Procedures that will clarify the role and responsibilities of the Campus Boards under a single accreditation with one governing board. The amendments are intended to preserve the well-established and valued advisory role of the Campus Boards and to align the Operating Procedures with the statutory requirements for the Campus Boards contained in sec. 1004.34, Florida Statutes:

[e]ach campus board has the powers and duties provided by law, which include the authority to approve and submit an annual operating plan, budget, and legislative budget request to the Board of Trustees of the University of South Florida. sec.1004.341 (3), Florida Statutes.

Additional changes were made to further state the Board’s fiduciary and oversight responsibilities within the university’s governance structure. Technical changes were also made for consistency of terms in the document (i.e. referring the Chair of the Board of Trustees as the Chair of the Board as opposed to Board Chair and/or Chair).

The amendments are attached in redline and clean formats and reflect the Governance Committee’s discussion on November 20, 2019.

The amendments are presented as an action item for approval, pending the Governance Committee’s review and discussion. Amendments to the Operating Procedures must be approved by the full Board.

Strategic Goal(s) Item Supports: USF System Strategic Goal Nos. 3 and 4
Committee Review Date: 08/27/19
Supporting Documentation Online: Yes
USF System or Institution specific: University- wide
Prepared by: Gerard D. Solis, General Counsel



November 12, 2019

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Select Year: 2019

The 2019 Florida Statutes

[Title XLVIII](#)[Chapter 1004](#)[View Entire Chapter](#)

K-20 EDUCATION CODE

PUBLIC POSTSECONDARY EDUCATION

11004.341 University of South Florida campuses.—

(1) The St. Petersburg and Sarasota/Manatee campuses of the University of South Florida are hereby established.

(a) The St. Petersburg campus of the University of South Florida shall be known as the “University of South Florida St. Petersburg” and shall include any college of the University of South Florida which is headquartered or primarily located in Pinellas County.

(b) The Sarasota/Manatee campus of the University of South Florida shall be known as the “University of South Florida Sarasota/Manatee” and shall include any college of the University of South Florida which is headquartered or primarily located in Sarasota County or Manatee County.

(2) The University of South Florida St. Petersburg and the University of South Florida Sarasota/Manatee shall each have a campus board and a regional chancellor. The Chair of the Board of Trustees of the University of South Florida, based upon recommendations of the President of the University of South Florida, shall appoint:

(a) Seven residents of Pinellas County to serve 4-year staggered terms on the Campus Board of the University of South Florida St. Petersburg. A member of the Board of Trustees of the University of South Florida who resides in Pinellas County shall jointly serve as a member of the Board of Trustees and as chair of the campus board. The chair of the faculty senate or the equivalent and the president of the student body of the campus shall serve as ex officio members.

(b) Four residents of Manatee County and three residents of Sarasota County to serve 4-year staggered terms on the Campus Board of the University of South Florida Sarasota/Manatee. A member of the Board of Trustees of the University of South Florida who resides in Manatee County or Sarasota County shall be selected by the Chair of the Board of Trustees of the University of South Florida to serve jointly as a member of the Board of Trustees and as chair of the campus board. The chair of the faculty senate or the equivalent and the president of the student body of the campus shall serve as ex officio members.

The Board of Trustees may reappoint a member to the campus board, other than the chair, for one additional term.

(3) Each campus board has the powers and duties provided by law, which include the authority to approve and submit an annual operating plan, budget, and legislative budget request to the Board of Trustees of the University of South Florida.

(4) The Board of Trustees shall publish and approve an annual operating budget for each campus and a report on the distribution of funds, including student tuition and fees, preeminence funding, and performance-based funding, provided to each campus.

(5) The Board of Trustees must publish on its website a biennial regional impact report, beginning

July 1, 2021, which details the specific increased investments in university programs located in Pinellas, Manatee, and Sarasota Counties. The report shall include, at a minimum, trend information related to access to new degree programs for students in those counties, any changes in student enrollment and outcomes at each campus located in those counties, increased research conducted and research infrastructure added in those counties, and any fixed capital outlay projects or property acquisitions planned or completed in those counties.

(6) The faculty and students at each campus shall be represented in the academic and student governance structures of the University of South Florida as determined by the Board of Trustees.

History.—s. 10, ch. 2018-4.

¹**Note.**—Effective July 2, 2020.

Proposed Amendments UBOT Operating Procedures 11/20/2019

Deleted:

**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” or “Board”) 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 Student Advisory Council and (2) the President of the University of South Florida 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 (i.e. the advisory board does not vote or take actions on university matters) 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 Student Advisory Council; the faculty representative serving on the USF 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.

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. Elected officers may serve for one additional consecutive 2-year term or until a successor is elected by majority vote, and for each additional consecutive term beyond two terms officers may be reelected by a

Proposed Amendments UBOT Operating Procedures 11/20/2019

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two-thirds vote. The University 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 Chair of the Board and Vice Chair terms of office not running concurrently.

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The officers shall have the following responsibilities:

1. Chair

a. The Chair of the Board may serve as Chair of the Finance Committee, serves as an ex officio voting member of all Committees of University Strategic Priorities and all Standing Committees of the Board, and appoints members thereof.

b. The Chair of the Board 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 of the Board shall appoint at least one representative to the board of directors and the executive committee of any direct-support organization certified by the Board.

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2. Vice-Chair

The Vice-Chair acts as Chair during the absence or disability of the Chair of the Board and during any temporary period of vacancy before election of a new Chair of the Board pursuant to Section C, 1 above and, in that event, shall perform those duties of the Chair described in these Operating Procedures.

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3. Corporate Secretary

a. The University 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 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.

Proposed Amendments UBOT Operating Procedures 11/20/2019

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This individual shall perform all duties delegated by the corporate secretary.

b. Subject to the Board's fiduciary and oversight responsibilities, the President serves as the Board's point of official contact with the Campus Advisory Boards, faculty, staff, students and support organizations of the University. The President is at all times accountable to the Board. The President exercises such powers as are appropriate to his/her position in promoting, supporting and protecting the interests of the University and in managing and directing its affairs, including, but not limited to approving all decisions impacting the organization, curriculum, budget, personnel and performance of the university, subject to the Board's established governance processes. 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 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.

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c. The President shall receive all Campus Advisory Board recommendations, plans, requests and budgets (collectively "Campus Advisory Board Materials") on behalf of the Board. Campus Advisory Board Materials are non-binding and advisory on the President and Board. The President shall promptly forward to the Governance Committee any Campus Advisory Materials relating to a matter that will come before the Board for action in its original form along with the President's recommendation to the Board to approve, revise or reject any portion or all of the Campus Advisory Board Materials. Consistent with the powers and duties delegated to the President by the Board, the President will review and consider Campus Advisory Board Materials that do not relate to a matter that will come before the Board for action.

Deleted: The President shall receive all Campus Board recommendations, plans and budgets (collectively "Campus Board Materials") on behalf of the Board. The President shall review Campus Board Materials and may approve, reject or revise any portion of the review and revise Campus Board Materials prior to submission to the Board; however regardless of disposition by the President, an original copy of the Campus Board Materials submitted to the President shall be provided to the Governance Committee. . The President may also decline to advance all or any part of the Campus Board Materials. The President shall promptly notify the Campus Board Chair of the disposition of Campus Board Materials and copy the Board Chair on the notification.

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d. The President of the University shall be a non-voting *ex-officio* member of the Governance committee, all Board Standing committees and Committees of Strategic Priorities, but will not be counted as part of a quorum for the purpose of transacting business.

Proposed Amendments UBOT Operating Procedures 11/20/2019

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D. Board of Trustees

The Board of Trustees is responsible for cost-effective policy decisions, implementing and maintaining high-quality education, research and creative programs consistent with the university’s mission, measuring the University performance and providing input regarding compliance with state policy, budgeting and education standards. The Board of Trustees sets policy for the University 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 [of the Board](#). Meetings of the Board are open to the public

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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 [of the Board](#).

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 [of the Board](#), an issue requires immediate Board action. Whenever such emergency meeting is called, the Chair [of the Board](#) 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.

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F. Quorum

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A majority of the members of the Board must be present to constitute a quorum for the transaction of business, unless otherwise provided in these Operating Procedures.

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.

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.

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**ARTICLE III
COMMITTEES**

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A. The Governance Committee

The Governance Committee shall have no fewer than three (3) voting members, all of whom shall be trustees. The Chair and Vice-Chair of the Board of Trustees shall be members. Additional trustees shall be appointed by the Chair 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. Committees on University Strategic Priorities

The Chair of the Board may establish temporary committees on University strategic priorities as deemed necessary for the orderly conduct of the business of the Board and that relate directly to the strategic priorities of the University. Each committee shall have a written statement of purpose and primary responsibilities as approved by the Board. The Chair of the Board shall determine the period of service of any such committee(s).

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The Chair of the Board appoints the members of the committee and any non-voting faculty and community liaisons, selects a chair of the committee, and serves as an ex officio voting member (when present) of any such committees. Committees on University Strategic Priorities shall make recommendations for consideration and action by the full Board or other Board committee, as authorized by these Operating Procedures.

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Proposed Amendments UBOT Operating Procedures 11/20/2019

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The chair of the committee shall perform the chair’s duties in consultation with the President and/or designee. The committees shall meet as often as the chair of the committee shall determine necessary. Minutes shall be taken and distributed to all Trustees for information at the next regular meeting of the Trustees. A majority of committee members present shall constitute a quorum for the transaction of business.

C. Standing Committees

Standing Committees are appointed by the Chair of the Board. The Chair of the Board 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 Chair of the Board. 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 President and/or designee. Minutes shall be taken and distributed to all Trustees.

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**ARTICLE V
AMENDMENT OF OPERATING PROCEDURES**

These Operating Procedures may be altered, amended or repealed by a majority vote of Board members at a 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 on which the requestor(s) wishes to comment.

Comments shall be generally heard at Board Committees. However, the President in consultation with the Chair of the Board will determine whether the item will be heard and when the item will be heard. There will be a three minute time limit on any presentation.

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Proposed Amendments UBOT Operating Procedures 11/20/2019

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The total time allotted for all comments shall not exceed fifteen minutes, unless approved by the Chair.

As permitted by section 286.0114 F.S., the Chair of the Board may decline to hear any matter that: does not relate to a particular agenda item; is not practicable for a particular meeting; is outside the Board's jurisdiction; or was made available for public comment at a prior workgroup or committee meeting before the Board takes action.

The Chair of the Board 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.

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**ARTICLE IV
REGIONAL CAMPUS ADVISORY BOARDS**

The Chair of the Board shall appoint members to the Regional Campus Advisory Boards, for USF St. Petersburg and USF Sarasota-Manatee based on the recommendations of the USF President. 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, other than the Chair of the Campus Board. Members may be reappointed as described herein, at the discretion of the Board, for additional terms not to exceed eight (8) years of service.

Deleted: The USF System is comprised of three (3) separately accredited institutions (i.e., regional campus), USF, USF St. Petersburg and USF Sarasota-Manatee.

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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 Chair of 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 Chair of the Board shall select one joint member.

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B. USF Sarasota-Manatee -- If a resident of Sarasota-Manatee Counties is appointed to the Board of Trustees of the University, the Chair of 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 Chair of the Board shall select one joint member.

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C. Campus Board Chair -- The Board of Trustees member appointed to the Campus Board shall chair their respective Campus Board Chair, unless otherwise approved by the Board of Trustees Chair.

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D. Authority -- As provided by applicable state law or regulation and subject to these Operating Procedures, the Regional Campus Boards shall have the authority to:

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1. Review and approve an annual campus legislative budget request, operating plan and budget, which will be submitted to the Board of Trustees.

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Deleted: 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. 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.

Deleted: 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.

**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.

Deleted: 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. ¶

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, perceived or potential conflict of interest.

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. ¶

1. Presumed Conflict of Interest

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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:

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- 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.

Deleted: 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. ¶
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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.

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Deleted: 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. ¶

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Deleted: The Board of Trustees appointed member shall chair their respective Campus Board unless otherwise approved by the Board of Trustees Chair ¶

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The Corporate Secretary, Assistant Corporate Secretary or the General Counsel shall inform the Chair of the Board of all conflict of interest matters disclosed by a Trustee. If it is determined that a conflict of interest exists, the Chair of the Board, Corporate Secretary or Assistant Corporate Secretary, and the General Counsel shall work with the affected Trustee to address the conflict.

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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 must 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 Chair of the Board and Corporate Secretary in the event of an actual conflict.

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6. Definitions

Proposed Amendments UBOT Operating Procedures 11/20/2019

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The terms used in this Article should be interpreted and defined as provided in Chapter 112, Part III, Florida Statutes: Code of Ethics for Public Officers and Employees.

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**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

**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” or “Board”) 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 Student Advisory Council and (2) the President of the University of South Florida 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 (i.e. the advisory board does not vote or take actions on university matters) 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 Student Advisory Council; the faculty representative serving on the USF 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.

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. Elected officers may serve for one additional consecutive 2-year term or until a successor is elected by majority vote, and for each additional consecutive term beyond two terms officers may be reelected by a

two-thirds vote. The University 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 Chair of the Board and Vice Chair terms of office not running concurrently.

The officers shall have the following responsibilities:

1. Chair

a. The Chair of the Board may serve as Chair of the Finance Committee, serves as an ex officio voting member of all Committees of University Strategic Priorities and all Standing Committees of the Board, and appoints members thereof.

b. The Chair of the Board 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 of the Board shall appoint at least one 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 of the Board and during any temporary period of vacancy before election of a new Chair of the Board pursuant to Section C, 1 above and, in that event, shall perform those duties of the Chair described in these Operating Procedures.

3. Corporate Secretary

a. The University 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 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. Subject to the Board's fiduciary and oversight responsibilities, the President serves as the Board's point of official contact with the Campus Advisory Boards, faculty, staff, students and support organizations of the University. The President is at all times accountable to the Board. The President exercises such powers as are appropriate to his/her position in promoting, supporting and protecting the interests of the University and in managing and directing its affairs, including but not limited to approving all decisions impacting the organization, curriculum, budget, personnel and performance of the university, subject to the Board's established governance processes. 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 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.

c. The President shall receive all Campus Advisory Board recommendations, plans, requests and budgets (collectively "Campus Advisory Board Materials") on behalf of the Board. Campus Advisory Board Materials are non-binding and advisory on the President and Board. The President shall promptly forward to the Governance Committee any Campus Advisory Materials relating to a matter that will come before the Board for action in its original form along with the President's recommendation to the Board to approve, revise or reject any portion or all of the Campus Advisory Board Materials. Consistent with the powers and duties delegated to the President by the Board, the President will review and consider Campus Advisory Board Materials that do not relate to a matter that will come before the Board for action.

d. The President of the University shall be a non-voting *ex-officio* member of the Governance committee, all Board Standing committees and Committees of Strategic Priorities, but will not be counted as part of a quorum for the purpose of transacting business.

D. Board of Trustees

The Board of Trustees is responsible for cost-effective policy decisions, implementing and maintaining high-quality education, research and creative programs consistent with the university's mission, measuring the University performance and providing input regarding compliance with state policy, budgeting and education standards. The Board of Trustees sets policy for the University 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:

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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.

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**ARTICLE II
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B. Special Meetings

The Board may meet in special meetings, including hearings and workshops, at such times and places designated by the Chair of the Board.

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 of the Board, an issue requires immediate Board action. Whenever such emergency meeting is called, the Chair of the Board 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, unless otherwise provided in these Operating Procedures.

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.

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 no fewer than three (3) voting members, all of whom shall be trustees. The Chair and Vice-Chair of the Board of Trustees shall be members. Additional trustees shall be appointed by the Chair 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. Committees on University Strategic Priorities

The Chair of the Board may establish temporary committees on University strategic priorities as deemed necessary for the orderly conduct of the business of the Board and that relate directly to the strategic priorities of the University. Each committee shall have a written statement of purpose and primary responsibilities as approved by the Board. The Chair of the Board shall determine the period of service of any such committee(s).

The Chair of the Board appoints the members of the committee and any non-voting faculty and community liaisons, selects a chair of the committee, and serves as an ex officio voting member (when present) of any such committees.

Committees on University Strategic Priorities shall make recommendations for consideration and action by the full Board or other Board committee, as authorized by these Operating Procedures.

The chair of the committee shall perform the chair's duties in consultation with the President and/or designee. The committees shall meet as often as the chair of the committee shall determine necessary. Minutes shall be taken and distributed to all Trustees for information at the next regular meeting of the Trustees. A majority of committee members present shall constitute a quorum for the transaction of business.

C. Standing Committees

Standing Committees are appointed by the Chair of the Board. The Chair of the Board 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 Chair of the Board. 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 President and/or designee. Minutes shall be taken and distributed to all Trustees.

**ARTICLE V
AMENDMENT OF OPERATING PROCEDURES**

These Operating Procedures may be altered, amended or repealed by a majority vote of Board members at a 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 on which the requestor(s) wishes to comment.

Comments shall be generally heard at Board Committees. However, the President in consultation with the Chair of the Board will determine whether the item will be heard and when the item will be heard. 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.

As permitted by section 286.0114 F.S., the Chair of the Board may decline to hear any matter that: does not relate to a particular agenda item; is not practicable for a particular meeting; is outside the Board's jurisdiction; or was made available for public comment at a prior workgroup or committee meeting before the Board takes action.

The Chair of the Board 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 IV REGIONAL CAMPUS ADVISORY BOARDS

The Chair of the Board shall appoint members to the Regional Campus Advisory Boards for USF St. Petersburg and USF Sarasota-Manatee based on the recommendations of the USF President. 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 nonfulfillment of Campus Board duties, other than the Chair of the Campus Board. Members may be reappointed as described herein, at the discretion of the Board, for additional terms 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 Chair of 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 Chair of 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 Chair of 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 Chair of the Board shall select one joint member.

- C. **Campus Board Chair** -- The Board of Trustees member appointed to the Campus Board shall chair their respective Campus Board Chair, unless otherwise approved by the Board of Trustees Chair.
- D. **Authority** -- As provided by applicable state law or regulation and subject to these Operating Procedures, the Regional Campus Boards shall have the authority to:
 - 1. Review and approve an annual campus legislative budget request, operating plan and budget, which will be submitted to the Board of Trustees.
 - 2. 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.

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, perceived 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 Chair of the Board of all conflict of interest matters disclosed by a Trustee. If it is determined that a conflict of interest exists, the Chair of the Board, 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 must 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 Chair of the Board and Corporate Secretary in the event of an actual conflict.

6. Definitions

The terms used in this Article should be interpreted and defined as provided in Chapter 112, Part III, Florida Statutes: Code of Ethics for Public Officers and Employees.

**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

**USF Board of Trustees
Full Board Meeting
December 3, 2019**

Issue: Amendments to the by laws and articles of incorporation of the USF Health Professions Conferencing Corporation. ("HPCC")

Proposed action: Recommend to the USF Board of Trustees for approval the attached amendments to the by laws and articles of incorporation of HPCC

Executive Summary:

In accordance with USF System Regulation 13.002, the USF Board of Trustees must approve all amendments to the by laws and articles of incorporation of USF Direct Support Organizations. This agenda item is to approve amendments the by laws and articles of incorporation of HPCC.

The primary substantive change to these documents corrects internal inconsistencies with regard to the composition of the HPCC Board of Directors. Specifically, the HPCC articles of incorporation have been revised to state that, while the HPCC Board of Directors must have a minimum of 5 members, the upper limit cap of 7 members has been deleted. The by laws have been revised to clarify that the HPCC Board of Directors must have a minimum of 5 members but no more than 9 members.

Additionally, HPCC has used this opportunity to review and amend the articles of incorporation to align with current best practices and remove matters of historical importance. HPCC presented these amendments to its Board of Directors for approval on August 28, 2019.

For your review, we have included:

- 1. USF System Regulation 13.002
 - 2. Redlined and clean copies of the proposed by laws and articles of incorporation of HPCC
-

Strategic Goal(s) Item Support: USF System Strategic Goal No 4: Sound financial management to establish a strong and sustainable economic base in support of USF's continued academic advancement.

Committee Review Date:

Supporting Documentation Online (Please Underline): Yes No

USF System or Institution Specific: USF System wide

Prepared by: Robert Pelaia, Deputy General Counsel

**AMENDED AND RESTATED
ARTICLES OF INCORPORATION
OF
USF HEALTH PROFESSIONS CONFERENCING CORPORATION**

The USF HEALTH PROFESSIONS CONFERENCING CORPORATION was originally incorporated on February 7, 2005, pursuant to the Florida Not For Profit Corporation Act.

In accordance with Sections 617.1002 and 617.1007 of the Florida Not For Profit Corporation Act and pursuant to approval by its Board of Directors on August 28, 2019, the USF HEALTH PROFESSIONS CONFERENCING CORPORATION hereby adopts these amended and restated articles of incorporation (Articles II, V, VIII, and IX are amended hereby). The corporation's Board of Directors approved the amendments in the manner set forth in the articles of incorporation and Florida law. There is no discrepancy between the articles of incorporation as amended and the provisions of the restated articles of incorporation other than the inclusion of the amended articles described above and the omission of matters of historical interest. There are no members entitled to vote on the adoption of these amended and restated articles of incorporation.

**ARTICLE I
NAME**

The name of the Corporation is USF HEALTH PROFESSIONS CONFERENCING CORPORATION.

**ARTICLE II
PRINCIPAL PLACE OF BUSINESS AND MAILING ADDRESS**

The address of the Corporation's principal office is 124 S. Franklin Street, Tampa, Florida 33602.

**ARTICLE III
PURPOSES**

The specific purposes for which this Corporation is organized are:

(a) To exist and operate solely for scientific, educational, religious and charitable purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code of 1986, as amended, (the "Code") and no part of the income or assets of this Corporation shall be distributed to, nor inure to the benefit of, any individual;

(b) To operate without regard to race, age, religion, sex or national origin;

(c) To be organized and operated solely as a direct-support organization for the University of South Florida the "University"), as defined in Section 1004.28 of the Florida Statutes, as may be amended or supplemented;

(d) To receive, hold, invest and administer property and to make expenditures to or for the exclusive benefit of the University, a member of the state university system of the State of Florida;

(e) To carry out its functions such that no substantial part of the Corporation's activities shall be the carrying on of propaganda, or otherwise attempting to influence legislation, and the Corporation

shall not participate in or intervene in (including the publishing or distribution of statements) any political campaign on behalf of (or in opposition to) any candidate for public office;

(f) To operate, participate in or manage any other programs or activities that are not prohibited by law and that do not conflict with the provisions of Section 501(c)(3) of the Code; and

(g) In order to further the purposes described above, to exercise all the powers enumerated in Section 617, Florida Statutes, as it now exists or is subsequently amended or superseded, and to do and perform such acts and to have such powers as shall be desirable and necessary in furtherance of any of the powers herein above enumerated which are not in derogation of the laws of the State of Florida.

ARTICLE IV POWERS

The Corporation shall have and exercise all powers of a corporation not for profit as the same now exist or may hereinafter exist under the laws of the State of Florida. No part of the assets, income or profits of the Corporation shall be distributable to, or inure to the benefit of, its members, directors or officers or any private individual, except that the Corporation shall be authorized and empowered to pay reasonable compensation to its employees for services rendered and to make payments and distributions in the furtherance of the purposes set forth herein. Notwithstanding any other provision hereof, the Corporation shall not conduct or carry on any activities not permitted to be conducted or carried on by an organization exempt from federal income taxation under Section 501(c)(3) of the Code or by an organization, contributions to which are deductible under Section 170(c)(2) of the Code.

Upon certification as a direct support organization by the University's Board of Trustees (the "Board of Trustees"), the Corporation shall be authorized to use the property, facilities and personal services of the University, to receive, hold, invest or administer assets or property and to make expenditures for the benefit of the University. The Corporation further shall be authorized to issue revenue bonds, certificates of participation or other forms of indebtedness upon approval of the Board of Trustees and in accordance with the applicable laws of the State of Florida, and to enter into agreements to finance design and construct, lease, lease purchase, purchase, or operate facilities necessary and desirable to serve the needs and purposes of the University .

ARTICLE V DIRECTORS AND THE MANNER OF ELECTION OF DIRECTORS

The Corporation shall be managed by or under the direction of a Board of Directors. At all times, there shall be at least five members of the Board of Directors. The Board of Directors shall carry out the purposes of the Corporation in compliance with these Articles of Incorporation and the Corporation's Bylaws. The method of appointment or election of directors shall be as stated in the Bylaws of this Corporation.

ARTICLE VI DISSOLUTION

In the event of dissolution of the Corporation, the winding up of its affairs, the decertification of the Corporation as a direct support organization by the Board of Trustees of the University, or other liquidation of its assets, the Corporation's property shall not be conveyed to any organization created or operated for profit or to any individual, and all assets remaining after the payment of the Corporation's debts shall be conveyed or distributed at the direction of the then Directors of the Corporation to the Board of Trustees, or if such organization has ceased to exist, to the University, or if such organization has ceased to

exist, to such other organization or organizations that are exempt from federal income tax under Section 501(c)(3) of the Code as directed by the Board of Governors of the State of Florida.

**ARTICLE VII
AMENDMENT**

These Articles of Incorporation may be amended in the manner provided by law.

**ARTICLE VIII
REGISTERED AGENT AND STREET ADDRESS**

The name and the street address of the registered agent are Gerard D. Solis, General Counsel, University of South Florida, 4202 East Fowler Avenue, CGS 301, Tampa, Florida 33620-6250.

**ARTICLE IX
INDEMNIFICATION**

Directors, officers, employees and agents of the Corporation shall be indemnified to the full extent permitted by Florida law.

[Remainder of page intentionally left blank]

IN WITNESS WHEREOF, the undersigned has executed these Amended and Restated Articles of Incorporation this ____ day of _____, 2019

USF HEALTH PROFESSIONS CONFERENCING CORPORATION

By: Rhea F. Law
Its: Chairperson

STATE OF FLORIDA
COUNTY OF HILLSBOROUGH

Before me, a Notary Public duly authorized in the State and County aforesaid to take acknowledgments, personally appeared Rhea F. Law, to me well known to be the person described in and who executed the foregoing Amended and Restated Articles of Incorporation, and she acknowledged before me that she executed and subscribed to these Amended and Restated Articles of Incorporation.

CERTIFICATE OF ACCEPTANCE AS REGISTERED AGENT

Having been named as the Registered Agent in the Articles of Incorporation of USF HEALTH PROFESSIONS CONFERENCING CORPORATION, I hereby accept and agree to act in this capacity.

Dated: November 2019

Gerard D. Solis, General Counsel

AMENDED AND RESTATED
ARTICLES OF INCORPORATION
OF
USF HEALTH PROFESSIONS CONFERENCING CORPORATION

~~The undersigned, acting as incorporator of a corporation pursuant to Chapter 617 Florida Statutes, adopts the following Articles of Incorporation:~~

~~The USF HEALTH PROFESSIONS CONFERENCING CORPORATION was originally incorporated on February 7, 2005, pursuant to the Florida Not For Profit Corporation Act.~~

~~In accordance with Sections 617.1002 and 617.1007 of the Florida Not For Profit Corporation Act and pursuant to approval by its Board of Directors on August 28, 2019, the USF HEALTH PROFESSIONS CONFERENCING CORPORATION hereby adopts these amended and restated articles of incorporation (Articles II, V, VIII, and IX are amended hereby). The corporation’s Board of Directors approved the amendments in the manner set forth in the articles of incorporation and Florida law. There is no discrepancy between the articles of incorporation as amended and the provisions of the restated articles of incorporation other than the inclusion of the amended articles described above and the omission of matters of historical interest. There are no members entitled to vote on the adoption of these amended and restated articles of incorporation.~~

ARTICLE I
NAME

The name of the Corporation is USF HEALTH PROFESSIONS CONFERENCING CORPORATION.

ARTICLE II
PRINCIPAL PLACE OF BUSINESS AND MAILING ADDRESS

The address of the Corporation’s principal office is ~~124 S. Franklin Street~~~~901 Bruce B. Downs Boulevard, MDC2~~, Tampa, Florida 33604~~2~~.

ARTICLE III
PURPOSES

The specific purposes for which this Corporation is organized are:

- (a) To exist and operate solely for scientific, educational, religious and charitable purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code of 1986, as amended, (the “Code”) and no part of the income or assets of this Corporation shall be distributed to, nor inure to the benefit of, any individual;
- (b) To operate without regard to race, age, religion, sex or national origin;
- (c) To be organized and operated solely as a direct-support organization for the University of South Florida the “University”), as defined in Section 1004.28 of the Florida Statutes, as may be amended or supplemented;
- (d) To receive, hold, invest and administer property and to make expenditures to or for the exclusive benefit of the University, a member of the state university system of the State of Florida;

(e) To carry out its functions such that no substantial part of the Corporation's activities shall be the carrying on of propaganda, or otherwise attempting to influence legislation, and the Corporation shall not participate in or intervene in (including the publishing or distribution of statements) any political campaign on behalf of (or in opposition to) any candidate for public office

(f) To operate, participate in or manage any other programs or activities that are not prohibited by law and that do not conflict with the provisions of Section 501(c)(3) of the Code; and

(g) In order to further the purposes described above, to exercise all the powers enumerated in Section 617, Florida Statutes, as it now exists or is subsequently amended or superseded, and to do and perform such acts and to have such powers as shall be desirable and necessary in furtherance of any of the powers herein above enumerated which are not in derogation of the laws of the State of Florida.

**ARTICLE IV
POWERS**

The Corporation shall have and exercise all powers of a corporation not for profit as the same now exist or may hereinafter exist under the laws of the State of Florida. No part of the assets, income or profits of the Corporation shall be distributable to, or inure to the benefit of, its members, directors or officers or any private individual, except that the Corporation shall be authorized and empowered to pay reasonable compensation to its employees for services rendered and to make payments and distributions in the furtherance of the purposes set forth herein. Notwithstanding any other provision hereof, the Corporation shall not conduct or carry on any activities not permitted to be conducted or carried on by an organization exempt from federal income taxation under Section 501(c)(3) of the Code or by an organization, contributions to which are deductible under Section 170(c)(2) of the Code.

Upon certification as a direct support organization by the University's Board of Trustees (the "Board of Trustees"), the Corporation shall be authorized to use the property, facilities and personal services of the University, to receive, hold, invest or administer assets or property and to make expenditures for the benefit of the University. The Corporation further shall be authorized to issue revenue bonds, certificates of participation or other forms of indebtedness upon approval of the Board of Trustees and in accordance with the applicable laws of the State of Florida, and to enter into agreements to finance design and construct, lease, lease purchase, purchase, or operate facilities necessary and desirable to serve the needs and purposes of the University .

**ARTICLE V
DIRECTORS AND THE MANNER OF ELECTION OF DIRECTORS**

The Corporation shall be managed by or under the direction of a Board of Directors. At all times, there shall be at least five but no more than ~~nine~~ ~~seven~~ members of the Board of Directors. The Board of Directors shall carry out the purposes of the Corporation in compliance with these Articles of Incorporation and the Corporation's Bylaws. The method of appointment or election of directors shall be as stated in the Bylaws of this Corporation.

**ARTICLE VI
DISSOLUTION**

In the event of dissolution of the Corporation, the winding up of its affairs, the decertification of the Corporation as a direct support organization by the Board of Trustees of the University, or other liquidation of its assets, the Corporation's property shall not be conveyed to any organization created or

operated for profit or to any individual, and all assets remaining after the payment of the Corporation's debts shall be conveyed or distributed at the direction of the then Directors of the Corporation to the Board of Trustees, or if such organization has ceased to exist, to the University, or if such organization has ceased to exist, to such other organization or organizations that are exempt from federal income tax under Section 501(c)(3) of the Code as directed by the Board of Governors of the State of Florida.

**ARTICLE VII
AMENDMENT**

These Articles of Incorporation may be amended in the manner provided by law.

**ARTICLE VIII
~~INITIAL~~ REGISTERED AGENT AND STREET ADDRESS**

The name and the street address of the ~~initial~~ registered agent are Gerard D. Solis~~Stephen D. Prevaux~~, General Counsel, University of South Florida, 4202 East Fowler Avenue, CGS 301ADM 250, Tampa, Florida 33620-6250.

**ARTICLE IX
INCORPORATOR**

~~The name and street address of the incorporator for these Articles of Incorporation are Stephen D. Prevaux, General Counsel, University of South Florida, 4202 East Fowler Avenue, ADM 250, Tampa, Florida 33620 6250.~~

**ARTICLE IX
INDEMNIFICATION**

Directors, officers, employees and agents of the Corporation shall be indemnified to the full extent permitted by Florida law.

[Remainder of page intentionally left blank]

~~IN WITNESS WHEREOF, I have set my hand and seal this ____ day of February 2005~~

Stephen D. Prevaux, General Counsel

IN WITNESS WHEREOF, the undersigned has executed these Amended and Restated Articles of Incorporation this ____ day of _____, 2019

UF HEALTH PROFESSIONS CONFERENCING CORPORATION

By: Rhea F. Law
Its: Chairperson

STATE OF FLORIDA
COUNTY OF HILLSBOROUGH

Before me, a Notary Public duly authorized in the State and County aforesaid to take acknowledgments, personally appeared Rhea F. Law, to me well known to be the person described in and who executed the foregoing Amended and Restated Articles of Incorporation, and she acknowledged before me that she executed and subscribed to these Amended and Restated Articles of Incorporation.

CERTIFICATE OF ACCEPTANCE AS REGISTERED AGENT

Having been named as the Registered Agent in the Articles of Incorporation of USF HEALTH PROFESSIONS CONFERENCING CORPORATION, I hereby accept and agree to act in this capacity.

Dated: ~~November 2019~~ February ____ 2005

~~Gerard D. Solis~~ Stephen D. Prevaux, General Counsel

BYLAWS
OF
USF HEALTH PROFESSIONS CONFERENCING CORPORATION
A University Direct-Support Organization of the
University of South Florida

Adopted by Board of Directors on February 2, 2006
Confirmed by USF Board of Trustees on March 2, 2006
Amended by Board of Directors on May 22, 2007 and October 5, 2007
Accepted by USF Board of Trustees on March 20, 2008
Amended by Board of Directors on April 26, 2019
Accepted by USF Board of Trustees on June 6, 2019
Amended by Board of Directors on August 28, 2019

**BYLAWS
OF
USF HEALTH PROFESSIONS CONFERENCING CORPORATION**

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**BYLAWS
OF
USF HEALTH PROFESSIONS CONFERENCING CORPORATION**

**ARTICLE 1
NAME**

The name of the Corporation shall be USF Health Professions Conferencing Corporation, a Florida not for profit corporation (the "Corporation"). The Corporation shall maintain a registered office in the State of Florida and a registered agent at such office and may have other offices within or without the state.

**ARTICLE 2
MEMBERS**

The Corporation's sole member shall be the University Of South Florida Board Of Trustees, a public body corporate of the State of Florida, acting for and on behalf of the University of South Florida, herein referred to as "Member."

**ARTICLE 3
BOARD OF DIRECTORS**

SECTION 3.1 General Powers. The business, property, affairs and funds of the Corporation shall be managed, supervised and controlled by its Board of Directors (the "Board of Directors") subject only to applicable law and the limitations contained in the Articles of Incorporation of the Corporation (the "Articles of Incorporation") and these Bylaws and the powers and duties reserved to the University of South Florida Board of Trustees (the "Board of Trustees") and the President of the University of South Florida (the "University") or his or her designee in regard to this Corporation. The Board of Directors shall have the authority to adopt policy for the Corporation, consistent with the Articles of Incorporation and these Bylaws.

SECTION 3.2 Reserved Powers. The President of the University or his or her designee shall have the following specific powers and duties with regard to this Corporation:

- (a) To monitor and control the use of the University's resources by this Corporation;
- (b) To control the use of the University name by this Corporation;
- (c) To monitor compliance of this Corporation with federal and state laws;
- (d) To recommend to the Board of Directors an annual budget of this Corporation; and

- (e) To review and approve quarterly expenditure plans of this Corporation.

SECTION 3.3 Number. The Board of Directors shall consist of at least five but no more than nine directors.

SECTION 3.4 Appointment of Directors and Tenure. The directors of the Corporation shall be appointed in the following manner:

- (1) One director shall be selected and appointed by the Chairperson of the University's Board of Trustees;
- (2) One director shall be either the President of the University or the designee of the President of the University, pursuant to Florida Statutes Section 1004.28(3);
- (3) Up to seven directors appointed by the University Senior Vice President for USF Health.

Terms of office of the members of the Board of Directors shall be four years in length. Members are eligible for reappointment. If a director is appointed to fill a vacancy before the end of the term of their predecessor, such director shall serve for the remainder of the term of the director being replaced. Except as set forth in 3.4(1) and 3.4(2) above, all other directors shall be approved by the University's Board of Trustees.

SECTION 3.5 Removal of Directors. A director may resign at any time by submitting a written resignation to the Board of Directors or its Chairperson or to the Corporation. The appointees of each person may be removed as a Director, without cause, by the appointing person.

SECTION 3.6 Conflicts and Duality of Interest. No contract or other transaction between the Corporation and one or more of its directors or any other corporation, firm, association or entity in which one or more of its directors are directors or officers or are financially interested is either void or voidable because of such relationship or interest, because such director or directors are present at the meeting of the Board of Directors or a committee thereof that authorized, approved or ratified such contract or transaction, or because his or their votes are counted for such purpose, if the contract or transaction is approved in compliance with the provisions of Section 617.0832 of the Florida Not For Profit Corporation Act, or any successor provision.

SECTION 3.7 Conflict of Interest Policy. The Board of Directors shall adopt and keep in full force and effect a substantial conflict of interest policy for its directors and principal officers in accordance with rules and regulations of the Internal Revenue Service applicable to tax exempt organizations.

SECTION 3.8 Directors' Meetings. An annual meeting of the Board of Directors shall be held within the State of Florida at 3:00 p.m. on the second Tuesday of November of each year, or on such other date as the Board of Directors shall designate. Regular meetings of the

Board of Directors may be held, with or without notice, at such time and place as from time to time shall be determined by the Chairperson of the Board or by the Executive Director. Special meetings of the Board of Directors may be called by the Chairperson of the Board or the Executive Director or Secretary of the Corporation or any two directors. Unless waived as provided by statute, written notice of the time and place of special meetings of the Board of Directors shall be given to each director either by personal delivery or by mail, facsimile, telegram or email at least three days before the meeting.

Members of the Board may participate in meetings of the Board by means of a conference telephone or similar communications equipment by which all persons participating can hear each other at the same time, and participation by such means shall constitute presence in person at such meeting.

At all meetings of the Board of Directors, the presence of a majority of the total number of directors shall be necessary and sufficient to constitute a quorum for the transaction of business. Unless otherwise required by the Articles of Incorporation, these Bylaws or Florida Statutes, the act of a majority of the directors present shall be the act of the Board of Directors. In the absence of a quorum, a majority of the directors present may adjourn the meeting from time to time until a quorum shall be present for the transaction of business.

ARTICLE 4 OFFICERS

SECTION 4.1 Officers. The officers of this Corporation shall be a Chairperson, an Executive Director, a Secretary-Treasurer and such other officers as may be determined by the Board of Directors. With the exception of the Executive Director and the Secretary-Treasurer, only members of the Board of Directors of the Corporation may be appointed as an officer of the Corporation pursuant to this Article 4. All officers shall have such authority and perform such duties as described below:

(1) Chairperson. The Chairperson shall preside at all meetings of the Board of Directors and shall do and perform such other duties as may be assigned by the Board of Directors.

(2) Executive Director. The Executive Director shall be responsible for the general, day-to-day management of the affairs of the Corporation. The Executive Director shall be responsible for the maintenance and management of the Corporation's activities and personnel and will have such authority and responsibility as may be prescribed by resolution of the Board of Directors.

(3) Secretary-Treasurer. The Secretary-Treasurer shall keep full and accurate minutes for all meetings of the Board of Directors and the Executive Committee, shall transmit all notices required by these Bylaws as may be amended and may sign documents with the Executive Director in the name of the Corporation. The Secretary-Treasurer shall have charge of all official records of the Corporation that shall be at all reasonable times open to examination

of any director, and shall in general perform all duties incident to management of the office of Secretary-Treasurer for the Board of Directors. The Secretary-Treasurer shall be a member of the Finance Committee, if any, of the Corporation, shall present the financial statements of the Corporation to the Board of Directors at each regular meeting of the Board of Directors and at such other times as the Board of Directors may determine. The Secretary-Treasurer shall ascertain that a full and accurate account is made of all monies received and paid out on accounts administered by the Corporation.

SECTION 4.2 Election, Appointment and Term of Office. The Chairperson shall be elected by the Board of Directors at the organizational and annual meetings of the Board. The Executive Director and the Secretary-Treasurer shall be appointed by the University Senior Vice President for USF Health. Other officers of the Corporation shall be elected as necessary by the Board of Directors at the annual meeting. The Executive Director and the Secretary-Treasurer shall hold office until his or her successor shall have been appointed or until his or her death, resignation or removal from office and each of the other officers shall serve terms of one year, each commencing immediately following their election or appointment.

SECTION 4.3 Removal. Any officer may be removed with or without cause by the Board of Directors whenever in its judgment the best interests of the Corporation would be served. The Secretary-Treasurer and the Executive Director may be removed with or without cause by the University Senior Vice President for USF Health.

SECTION 4.4 Vacancies. A vacancy in any office, other than Executive Director and the Secretary-Treasurer, because of death, resignation, removal, disqualification or otherwise may be filled by the Board of Directors. A vacancy in the office of Executive Director or Secretary-Treasurer shall be filled by the University Senior Vice President for USF Health.

ARTICLE 5 COMMITTEES

SECTION 5.1 Creation of Committees. The Board of Directors may, by resolution passed by a majority of the whole Board, designate an Executive Committee and one or more other committees, each to consist of one or more of the directors of the Corporation.

SECTION 5.2 Executive Committee. The Executive Committee, if there shall be one, shall consult with and advise the officers of the Corporation in the management of its business and shall have and may exercise to the extent provided in the resolution of the Board of Directors creating such Executive Committee such powers of the Board of Directors as can be lawfully delegated by the Board. The Director appointed by the Chair of the Board of Trustees and the President of the University (or the designee of the President of the University) shall also serve as members of the Executive Committee in accordance with Florida Statutes Section 1004.28(3).

SECTION 5.3 Other Committees. Such other committees shall have such functions and may exercise the powers of the Board of Directors as can be lawfully delegated and to the extent provided in the resolution or resolutions creating such committee or committees.

SECTION 5.4 Meetings of Committees. Regular meetings of the Executive Committee and other committees may be held without notice at such time and at such place as shall from time to time be determined by the Executive Committee or such other committees, and special meetings of the Executive Committee or such other committees may be called by any member thereof upon two days' notice to each of the other members of such committee, or on such shorter notice as may be agreed to in writing by each of the other members of such committee, given either personally or by mail, facsimile, telegram or email.

SECTION 5.5 Vacancies on Committees. Vacancies on the Executive Committee or on such other committees shall be filled by the Board of Directors then in office at any regular or special meeting except that if the vacancy on the Executive Committee is with respect to the director appointed by the Chair of the Board of Trustees, then the Chair of the Board of Trustees shall designate a replacement.

SECTION 5.6 Minutes of Committees. The Executive Committee, if there shall be one, and such other committees shall keep regular minutes of their proceedings and report the same to the Board of Directors when required.

ARTICLE 6 INDEMNIFICATION

SECTION 6.1 Indemnification. The Corporation shall indemnify each director, officer, employee and agent of the Corporation, and may indemnify any other person, to the full extent permitted by the Florida Not For Profit Corporation Act and other applicable laws. The rights conferred by this Section 6.1 shall not be exclusive of any other right that any director, officer, employee, agent or other person may have or hereafter acquire under the Florida Not For Profit Corporation Act, any other statute or agreement, pursuant to a vote of disinterested directors, or otherwise. No repeal or modification of this Section 6.1 shall limit the rights of any director, officer, employee or agent to indemnification with respect to any action or omission occurring prior to such repeal or modification.

ARTICLE 7 AMENDMENT

These Bylaws may be amended by the vote of a majority of the Board of Directors of this Corporation, but only if confirmed by the Board of Trustees of the University after submission to them by the President of the University.

**ARTICLE 8
QUARTERLY EXPENDITURE PLANS**

This Corporation shall prepare and submit to the President of the University or his or her designee, no later than the first day of each quarter of the Corporation's fiscal year, a quarterly expenditure plan that delineates planned actions that would cause a commitment of University resources or represent a significant commitment of the resources of this Corporation, including:

- (a) capital projects, including land acquisition, construction, renovation or repair;
- (b) compensation and benefits to University employees and employees of the Corporation; and
- (c) other major commitments of the resources of this Corporation.

**ARTICLE 9
FISCAL YEAR AND FINANCIAL AUDITS**

SECTION 9.1 Fiscal Year. The fiscal year of the Corporation shall be the period ending on June 30 of each year.

SECTION 9.2 Financial Audits. After the close of each fiscal year, the Corporation shall cause a financial audit of its accounts and records to be conducted by an independent certified public accountant pursuant to Section 1004.28, Florida Statutes, as may be amended or supplemented, and in accordance with the rules adopted by the Auditor General pursuant to Section 11.45, Florida Statutes, as may be amended or supplemented. The Corporation shall submit the annual audit report to the President of the University for transmittal to the University Board of Trustees and the Auditor General within nine months after the end of the fiscal year in accordance with Florida Statutes Section 1004.28(5). In addition, the Corporation shall provide a copy of its federal Application for Recognition of Exception (form 1023) and each year shall provide a copy of its Form 990, Return of Organization Exempt from Federal Income Tax, to the President of the University and the State Board of Education and/or the Board of Governors, as required by applicable laws of the State of Florida.

**ARTICLE 10
EMPLOYEES**

Any person employed by the Corporation shall not be considered an employee of the State of Florida or an employee of the University by virtue of his or her employment by the

Corporation. The Corporation shall provide equal employment opportunities to all persons regardless of race, color, religion, gender, age or natural origin.

**ARTICLE 11
PARLIAMENTARY RULES**

The most recent edition of "Roberts Rules of Order" shall be followed in conducting the meetings of the Board of Directors, unless otherwise provided in these bylaws.

BYLAWS
OF
USF HEALTH PROFESSIONS CONFERENCING CORPORATION
A University Direct-Support Organization of the
University of South Florida

Adopted by Board of Directors on February 2, 2006

Confirmed by USF Board of Trustees on March 2, 2006

Amended by Board of Directors on May 22, 2007 and October 5, 2007

Accepted by USF Board of Trustees on March 20, 2008

Amended by Board of Directors on April 26, 2019

Accepted by USF Board of Trustees on June 6, 2019

Amended by Board of Directors on August 28, 2019

**BYLAWS
OF
USF HEALTH PROFESSIONS CONFERENCING CORPORATION**

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**BYLAWS
OF
USF HEALTH PROFESSIONS CONFERENCING CORPORATION**

**ARTICLE 1
NAME**

The name of the Corporation shall be USF Health Professions Conferencing Corporation, a Florida not for profit corporation (the "Corporation"). The Corporation shall maintain a registered office in the State of Florida and a registered agent at such office and may have other offices within or without the state.

**ARTICLE 2
MEMBERS**

The Corporation's sole member shall be the University Of South Florida Board Of Trustees, a public body corporate of the State of Florida, acting for and on behalf of the University of South Florida, herein referred to as "Member."

**ARTICLE 3
BOARD OF DIRECTORS**

SECTION 3.1 General Powers. The business, property, affairs and funds of the Corporation shall be managed, supervised and controlled by its Board of Directors (the "Board of Directors") subject only to applicable law and the limitations contained in the Articles of Incorporation of the Corporation (the "Articles of Incorporation") and these Bylaws and the powers and duties reserved to the University of South Florida Board of Trustees (the "Board of Trustees") and the President of the University of South Florida (the "University") or his or her designee in regard to this Corporation. The Board of Directors shall have the authority to adopt policy for the Corporation, consistent with the Articles of Incorporation and these Bylaws.

SECTION 3.2 Reserved Powers. The President of the University or his or her designee shall have the following specific powers and duties with regard to this Corporation:

- (a) To monitor and control the use of the University's resources by this Corporation;
- (b) To control the use of the University name by this Corporation;
- (c) To monitor compliance of this Corporation with federal and state laws;
- (d) To recommend to the Board of Directors an annual budget of this Corporation; and

- (e) To review and approve quarterly expenditure plans of this Corporation.

SECTION 3.3 Number. The Board of Directors shall consist of at least five but no more than ~~ninse~~nineseven directors.

SECTION 3.4 Appointment of Directors and Tenure. The directors of the Corporation shall be appointed in the following manner:

- (1) One director shall be selected and appointed by the Chairperson of the University's Board of Trustees;
- (2) One director shall be either the President of the University or the designee of the President of the University, pursuant to Florida Statutes Section 1004.28(3);
- (3) Up to seven directors appointed by the University Senior Vice President for USF Health.

Terms of office of the members of the Board of Directors shall be four years in length. Members are eligible for reappointment. If a director is appointed to fill a vacancy before the end of the term of their predecessor, such director shall serve for the remainder of the term of the director being replaced. Except as set forth in 3.4(1) and 3.4(2) above, all other directors shall be approved by the University's Board of Trustees.

SECTION 3.5 Removal of Directors. A director may resign at any time by submitting a written resignation to the Board of Directors or its Chairperson or to the Corporation. The appointees of each person may be removed as a Director, without cause, by the appointing person.

SECTION 3.6 Conflicts and Duality of Interest. No contract or other transaction between the Corporation and one or more of its directors or any other corporation, firm, association or entity in which one or more of its directors are directors or officers or are financially interested is either void or voidable because of such relationship or interest, because such director or directors are present at the meeting of the Board of Directors or a committee thereof that authorized, approved or ratified such contract or transaction, or because his or their votes are counted for such purpose, if the contract or transaction is approved in compliance with the provisions of Section 617.0832 of the Florida Not For Profit Corporation Act, or any successor provision.

SECTION 3.7 Conflict of Interest Policy. The Board of Directors shall adopt and keep in full force and effect a substantial conflict of interest policy for its directors and principal officers in accordance with rules and regulations of the Internal Revenue Service applicable to tax exempt organizations.

SECTION 3.8 Directors' Meetings. An annual meeting of the Board of Directors shall be held within the State of Florida at 3:00 p.m. on the second Tuesday of November of each year, or on such other date as the Board of Directors shall designate. Regular meetings of the

Board of Directors may be held, with or without notice, at such time and place as from time to time shall be determined by the Chairperson of the Board or by the Executive Director. Special meetings of the Board of Directors may be called by the Chairperson of the Board or the Executive Director or Secretary of the Corporation or any two directors. Unless waived as provided by statute, written notice of the time and place of special meetings of the Board of Directors shall be given to each director either by personal delivery or by mail, facsimile, telegram or email at least three days before the meeting.

Members of the Board may participate in meetings of the Board by means of a conference telephone or similar communications equipment by which all persons participating can hear each other at the same time, and participation by such means shall constitute presence in person at such meeting.

At all meetings of the Board of Directors, the presence of a majority of the total number of directors shall be necessary and sufficient to constitute a quorum for the transaction of business. Unless otherwise required by the Articles of Incorporation, these Bylaws or Florida Statutes, the act of a majority of the directors present shall be the act of the Board of Directors. In the absence of a quorum, a majority of the directors present may adjourn the meeting from time to time until a quorum shall be present for the transaction of business.

ARTICLE 4 OFFICERS

SECTION 4.1 Officers. The officers of this Corporation shall be a Chairperson, an Executive Director, a Secretary-Treasurer and such other officers as may be determined by the Board of Directors. With the exception of the Executive Director and the Secretary-Treasurer, only members of the Board of Directors of the Corporation may be appointed as an officer of the Corporation pursuant to this Article 4. All officers shall have such authority and perform such duties as described below:

(1) Chairperson. The Chairperson shall preside at all meetings of the Board of Directors and shall do and perform such other duties as may be assigned by the Board of Directors.

(2) Executive Director. The Executive Director shall be responsible for the general, day-to-day management of the affairs of the Corporation. The Executive Director shall be responsible for the maintenance and management of the Corporation's activities and personnel and will have such authority and responsibility as may be prescribed by resolution of the Board of Directors.

(3) Secretary-Treasurer. The Secretary-Treasurer shall keep full and accurate minutes for all meetings of the Board of Directors and the Executive Committee, shall transmit all notices required by these Bylaws as may be amended and may sign documents with the Executive Director in the name of the Corporation. The Secretary-Treasurer shall have charge of all official records of the Corporation that shall be at all reasonable times open to examination

of any director, and shall in general perform all duties incident to management of the office of Secretary-Treasurer for the Board of Directors. The Secretary-Treasurer shall be a member of the Finance Committee, if any, of the Corporation, shall present the financial statements of the Corporation to the Board of Directors at each regular meeting of the Board of Directors and at such other times as the Board of Directors may determine. The Secretary-Treasurer shall ascertain that a full and accurate account is made of all monies received and paid out on accounts administered by the Corporation.

SECTION 4.2 Election, Appointment and Term of Office. The Chairperson shall be elected by the Board of Directors at the organizational and annual meetings of the Board. The Executive Director and the Secretary-Treasurer shall be appointed by the University Senior Vice President for USF Health. Other officers of the Corporation shall be elected as necessary by the Board of Directors at the annual meeting. The Executive Director and the Secretary-Treasurer shall hold office until his or her successor shall have been appointed or until his or her death, resignation or removal from office and each of the other officers shall serve terms of one year, each commencing immediately following their election or appointment.

SECTION 4.3 Removal. Any officer may be removed with or without cause by the Board of Directors whenever in its judgment the best interests of the Corporation would be served. The Secretary-Treasurer and the Executive Director may be removed with or without cause by the University Senior Vice President for USF Health.

SECTION 4.4 Vacancies. A vacancy in any office, other than Executive Director and the Secretary-Treasurer, because of death, resignation, removal, disqualification or otherwise may be filled by the Board of Directors. A vacancy in the office of Executive Director or Secretary-Treasurer shall be filled by the University Senior Vice President for USF Health.

ARTICLE 5 COMMITTEES

SECTION 5.1 Creation of Committees. The Board of Directors may, by resolution passed by a majority of the whole Board, designate an Executive Committee and one or more other committees, each to consist of one or more of the directors of the Corporation.

SECTION 5.2 Executive Committee. The Executive Committee, if there shall be one, shall consult with and advise the officers of the Corporation in the management of its business and shall have and may exercise to the extent provided in the resolution of the Board of Directors creating such Executive Committee such powers of the Board of Directors as can be lawfully delegated by the Board. The Director appointed by the Chair of the Board of Trustees and the President of the University (or the designee of the President of the University) shall also serve as members of the Executive Committee in accordance with Florida Statutes Section 1004.28(3).

SECTION 5.3 Other Committees. Such other committees shall have such functions and may exercise the powers of the Board of Directors as can be lawfully delegated and to the extent provided in the resolution or resolutions creating such committee or committees.

SECTION 5.4 Meetings of Committees. Regular meetings of the Executive Committee and other committees may be held without notice at such time and at such place as shall from time to time be determined by the Executive Committee or such other committees, and special meetings of the Executive Committee or such other committees may be called by any member thereof upon two days' notice to each of the other members of such committee, or on such shorter notice as may be agreed to in writing by each of the other members of such committee, given either personally or by mail, facsimile, telegram or email.

SECTION 5.5 Vacancies on Committees. Vacancies on the Executive Committee or on such other committees shall be filled by the Board of Directors then in office at any regular or special meeting except that if the vacancy on the Executive Committee is with respect to the director appointed by the Chair of the Board of Trustees, then the Chair of the Board of Trustees shall designate a replacement.

SECTION 5.6 Minutes of Committees. The Executive Committee, if there shall be one, and such other committees shall keep regular minutes of their proceedings and report the same to the Board of Directors when required.

ARTICLE 6 INDEMNIFICATION

SECTION 6.1 Indemnification. The Corporation shall indemnify each director, officer, employee and agent of the Corporation, and may indemnify any other person, to the full extent permitted by the Florida Not For Profit Corporation Act and other applicable laws. The rights conferred by this Section 6.1 shall not be exclusive of any other right that any director, officer, employee, agent or other person may have or hereafter acquire under the Florida Not For Profit Corporation Act, any other statute or agreement, pursuant to a vote of disinterested directors, or otherwise. No repeal or modification of this Section 6.1 shall limit the rights of any director, officer, employee or agent to indemnification with respect to any action or omission occurring prior to such repeal or modification.

ARTICLE 7 AMENDMENT

These Bylaws may be amended by the vote of a majority of the Board of Directors of this Corporation, but only if confirmed by the Board of Trustees of the University after submission to them by the President of the University.

**ARTICLE 8
QUARTERLY EXPENDITURE PLANS**

This Corporation shall prepare and submit to the President of the University or his or her designee, no later than the first day of each quarter of the Corporation's fiscal year, a quarterly expenditure plan that delineates planned actions that would cause a commitment of University resources or represent a significant commitment of the resources of this Corporation, including:

- (a) capital projects, including land acquisition, construction, renovation or repair;
- (b) compensation and benefits to University employees and employees of the Corporation; and
- (c) other major commitments of the resources of this Corporation.

**ARTICLE 9
FISCAL YEAR AND FINANCIAL AUDITS**

SECTION 9.1 Fiscal Year. The fiscal year of the Corporation shall be the period ending on June 30 of each year.

SECTION 9.2 Financial Audits. After the close of each fiscal year, the Corporation shall cause a financial audit of its accounts and records to be conducted by an independent certified public accountant pursuant to Section 1004.28, Florida Statutes, as may be amended or supplemented, and in accordance with the rules adopted by the Auditor General pursuant to Section 11.45, Florida Statutes, as may be amended or supplemented. The Corporation shall submit the annual audit report to the President of the University for transmittal to the University Board of Trustees and the Auditor General within nine months after the end of the fiscal year in accordance with Florida Statutes Section 1004.28(5). In addition, the Corporation shall provide a copy of its federal Application for Recognition of Exception (form 1023) and each year shall provide a copy of its Form 990, Return of Organization Exempt from Federal Income Tax, to the President of the University and the State Board of Education and/or the Board of Governors, as required by applicable laws of the State of Florida.

**ARTICLE 10
EMPLOYEES**

Any person employed by the Corporation shall not be considered an employee of the State of Florida or an employee of the University by virtue of his or her employment by the

Corporation. The Corporation shall provide equal employment opportunities to all persons regardless of race, color, religion, gender, age or natural origin.

**ARTICLE 11
PARLIAMENTARY RULES**

The most recent edition of "Roberts Rules of Order" shall be followed in conducting the meetings of the Board of Directors, unless otherwise provided in these bylaws.



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: 12-4-18

Date Last Reviewed: 12-4-18

(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 Articles or Bylaws, as applicable, of a Support Organization shall require the President, or his or her designee, serve on the Support Organization's board of directors and its executive committee.
- c) The Board shall approve all other appointments to the board of directors of each Support Organization.

(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) Thresholds for approval of purchases, acquisitions, projects and issuance of debt by Support Organizations shall be set by the Board. The Chair of the Finance Committee of the Board shall approve purchases, acquisitions, projects and issuance of debt by Support Organizations that total equal to or greater than one million dollars (\$1,000,000). The Finance Committee of the Board shall approve purchases, acquisitions, project and issuance of debt by the Support Organizations that total equal to or greater than two million dollars (\$2,000,000).

(7) All debt issued by a Support Organization is subject to the State University System Debt Management Guidelines and all public-private partnership transactions involving a Support Organization are subject to the State University System Public-Private Partnership Guidelines.

(8) 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.

- (9) 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
- g) Workplace Discrimination and Retaliation Policy
- h) Public Appearance Policy

Support Organizations may adopt such other policies and procedures deemed appropriate by their board of directors. Each Support Organization shall certify to the Board that all of the above policies are adopted and then reviewed on an annual basis.

(10) 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.

(11) 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](#).

(12) A Support Organization is prohibited from receiving 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), 9-4-18, 12-4-18.

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 105

USF Board of Trustees
December 3, 2019

Issue: Direct Support Organization Board Members

Proposed action: Approve Direct Support Organization Board Members

Executive summary:

Per Florida Statute Section 1004.28 and USF System Regulation 13.002, the USF Board of Trustees must approve members of Direct Support Organizations' Boards of Directors.

USF Health Professions Conferencing Corporation (USF HPCC) Board of Directors

Dr. Moez Limayem serves as the Dean of the USF Muma College of Business and has over 30 years of experience in business administration, IT, and higher education. In his role as Dean, Dr. Limayem has been successful in enhancing the college's profile and increasing its resources, building program demand, and strengthening relationships with varied stakeholders, including alumni, and business leaders. He is the recipient of numerous professional awards, and published dozens of articles, many of which focus on the intersection of technology with the consumer, academic and business worlds. Dr. Limayem worked in the private sector as a systems analyst and computing consultant before receiving his MBA and PhD in business administration from the University of Minnesota. Since 1992, Dr. Limayem has served as an international expert in IT for UNESCO. He has also taught at universities across the globe including the University of Minnesota, Laval University in Canada, City University of Hong Kong, and Lausanne University in Switzerland, as well as the University of Arkansas.

Dr. Limayem will be replacing Dr. Robert Bishop's appointment, which ended in June 2019. Dr. Limayem is eligible for an appointment ending June 30, 2022.

Prepared by: Leslie Mundell-Crucet, USF Health

Agenda Item: FL 106

USF Board of Trustees
December 3, 2019

Issue: Direct Support Organization Board Members

Proposed action: Approve Direct Support Organization Board Members

Executive summary:

Per Florida Statute Section 1004.28 and USF System Regulation 13.002, the USF Board of Trustees must approve members of Direct Support Organizations' Boards of Directors.

USF Research Foundation

Gwen Mitchell is partner at Deloitte & Touche and has 39 years of experience in public accounting, primarily serving clients in consumer business, heavy manufacturing and distribution. Ms. Mitchell has served as the lead client service partner on significant global public reporting, mid size and private clients and as a leader in community organizations and the firm's quality network as part of the inspections and monitoring group and is currently serving as senior partner advisor in Deloitte's audit technology and transformation group. Ms. Mitchell also has experience serving the community, such as the Tampa Chamber of Commerce Board and USF School of Accounting Advisory Board. Ms. Mitchell has a Bachelor of Accountancy from the University of Oklahoma and is a CPA in Florida, Texas and Oklahoma.

Ms. Mitchell is eligible for an appointment ending June 30, 2022.

Prepared by: Travis Miller, Office of the President

Agenda Item: FL 107

USF Board of Trustees
December 3, 2019

Issue: Direct Support Organization Board Members

Proposed action: Approve Direct Support Organization Board Members

Executive summary:

Per Florida Statute Section 1004.28 and USF System Regulation 13.002, the USF Board of Trustees must approve members of Direct Support Organizations' Boards of Directors.

USF Institute of Applied Engineering

GENERAL (retired) Raymond A. Thomas III retired from the United States Army in March 2019 after serving as the 11th Commander of U.S. Special Operations Command (USSOCOM) headquartered at MacDill Air Force Base, Fla. Prior to assuming command of USSOCOM, GEN Thomas served as Commander, Joint Special Operations Command (JSOC), Fort Bragg, N.C. He is a graduate of the US Army War College, Carlisle, Penn., and the Naval Command and Staff College, Newport, R.I. GEN Thomas is a native of Philadelphia, Pa. He attended the United States Military Academy at West Point, N.Y., and was commissioned an infantry second lieutenant upon graduation in 1980.

GEN (ret) Thomas is eligible for an appointment ending December 3, 2022.

Gregory Celestan the Chief Executive Officer for Celestar Corporation, which provides subject matter expertise as well as recent experience in intelligence, operations, planning, training and IT services for the US Government. Mr. Celestan earned a Master of Arts in International Affairs from the University of Washington and a Bachelor of Science in Engineering and Russian Area Studies from the United States Military Academy at West Point. Mr. Celestan retired from the U.S. Army in 2004 as a Lieutenant Colonel with twenty years of experience leading U.S. and foreign military personnel.

Mr. Celestan is eligible for an appointment ending December 3, 2022.

John Wilcox is the Vice President for Strategic Initiatives, where he is responsible for identifying emerging opportunities as part of their growth team. Prior to his current role, he served as United States Special Operations Command Chief Information Officer from 2009-2018. As a member of the Senior Executive Service, Mr. Wilcox was responsible for the complete lifecycle of special operations command, control, communications, and computers (C4) policy, doctrine, budget, acquisition, and operation. He established direction and guidance for the worldwide operation, governance, and defense of the

SOF Information environment serving eighty thousand personnel, and supervised a global staff of 730 while executing an annual budget of \$1.2B.

Mr. Wilcox is eligible for an appointment ending December 3, 2022.

Mark House serves as Director of Strategic Projects for The Beck Group, where he works with Beck's Leadership and Business Developers across the firm to seek out investors and end users of real estate to provide program/project management, design and construction services. Mr. House is also responsible for Beck's National Healthcare and Life Science business. Under his leadership, notable projects that Beck has built in Florida are the The Dali Museum in St. Petersburg, University of South Florida's Marshall Student Center and USF Health CAMLS, multiple projects at The University of Tampa, The Sykes Building, and Airside "C", the Southwest Airlines airside at Tampa International Airport. Mr. House holds a Florida Class "A" General Contractor's license as well as an engineering degree specializing in aerospace engineering from the United States Military Academy at West Point.

Mr. House is eligible for an appointment ending December 3, 2022.

Prepared by: Eric Forsyth, Executive Director, Institute of Applied Engineering

Agenda Item: IIIb

USF Board of Trustees
December 3, 2019

Issue: University Auxiliary Facilities with Outstanding Revenue Bonds

Proposed action: Approve Operating Budget for USF Parking Facilities Revenue Bonds, Series 2016A

Executive Summary:

Board of Governors Regulation 9.008 “University Auxiliary Facilities with Outstanding Revenue Bonds,” amended June 22, 2017, requires universities with outstanding auxiliary revenue bonds to annually submit a detailed operating budget to the Board of Governors at least ninety (90) days before the beginning of the fiscal year.

BOG Regulation 9.008 also states that the operating budget for University Auxiliary Facilities must be approved by the Board of Trustees before submitting to the Board of Governors.

The Operating Budget for the USF Parking Facilities Revenue Bonds is due to the Board of Governors in February 2020 for the fiscal period 2020-2021.

Financial Impact:

The FY 2020-2021 Operating Budget for the USF Parking Facilities Revenue Bond, Series 2016A ensures that debt service coverage complies with bond covenants and remains at levels to maintain or improve credit ratings, and ensures that reserves are maintained at an appropriate level.

Strategic Goal(s) Item Supports:	Goal 4: Sound Financial Management
Committee Review Date:	Finance Committee - November 20, 2019
Supporting Documentation Online (please circle):	Yes No
	USF Parking Revenue Bonds, Series 2016A – Income and Expenditure Statement (Operating Budget)
USF System or Institution specific:	USF Tampa
Prepared by:	Fell L. Stubbs, University Treasurer, (813) 974-3298

INCOME AND EXPENDITURE STATEMENT			
UNIVERSITY : University of South Florida			
BOND TITLE : Parking Revenue Bonds: Series 2016A			
AUXILIARY FACILITY (IES) : Parking Garages 1,2,3, & 4			
	2018-19 Actual	2019-20 Estimated	2020-21 Projected
1. REVENUE CARRIED FORWARD			
A. Operating Cash Carried Forward:			
Liquid	16,216,359	17,703,847	17,363,402
Investments	0	0	0
Subtotal:	16,216,359	17,703,847	17,363,402
B. Replacement Reserve Forward:			
Debt Service Reserve	23,984	23,984	23,984
Maintenance & Equipment Reserve	3,031,907	3,190,853	3,342,781
General Reserve	7,846,696	8,352,496	8,599,157
Subtotal:	10,902,587	11,567,333	11,965,922
TOTAL CARRIED FORWARD (A +B):	27,118,946	29,271,180	29,329,324
2. CURRENT YEAR REVENUE / INFLOWS			
* Revenue	14,422,183	13,832,078	14,000,000
Interest Income	4,209	3,339	3,900
Other Income / Inflows	0	0	0
TOTAL CURRENT YEAR REVENUE:	14,426,392	13,835,417	14,003,900
3. SUMMARY OF AVAILABLE REVENUES (1 +2):	41,545,338	43,106,597	43,333,224
4. CURRENT YEAR EXPENDITURES / OUTFLOWS			
Salaries and Matching	4,026,252	4,613,604	4,705,876
Other Personal Services	264,686	400,000	400,000
Operating Expense	4,036,137	4,800,000	4,800,000
Repairs and Maintenance	0	0	0
Debt Service	2,936,430	2,940,330	2,937,910
Repair and Replacement Expense	0	0	0
Operating Capital Outlay	368,135	370,000	450,000
Other Outflows & Transfers Out	829,459	900,000	920,000
TOTAL EXPENDITURES:	12,461,099	14,023,934	14,213,786
5. TRANSFERS TO REPLACEMENT RESERVES			
Debt Service Reserve	0	0	0
Maintenance & Equipment Reserve	158,946	151,928	153,000
General Reserve	318,859	0	0
Subtotal:	477,805	151,928	153,000
6. TRANSFERS FROM REPLACEMENT RESERVES			
Debt Service Reserve	0	0	0
Maintenance & Equipment Reserve	0	0	0
General Reserve	498,161	450,000	500,000
Subtotal:	498,161	450,000	500,000
7. ENDING REPLACEMENT RESERVES (1B +5 -6)			
Debt Service Reserve	23,984	23,984	23,984
Maintenance & Equipment Reserve	3,190,853	3,342,781	3,495,781
General Reserve	7,667,394	7,902,496	8,099,157
Interest Earned on Reserve Balances	685,102	696,661	685,100
Subtotal:	11,567,333	11,965,922	12,304,022
8. ENDING OPERATING CASH (1A +2 -4 -5)	17,703,847	17,363,402	17,000,516
9. SUMMARY OF ENDING REVENUES (7 +8)	29,271,180	29,329,324	29,304,538

*** REQUIRED INFORMATION ***

Date budget approved by University Board of Trustees :	December 14, 2017	December 4, 2018	December 3, 2019
Prepared By : Raymond Mensah	Telephone :	974-0672	

* Revenue as outlined in the Bond Covenants to support the debt servicing of the bonds.

Page 2

**UNIVERSITY AXILIARY FACILITIES
NARRATIVE SUPPLEMENT TO INCOME AND EXPENDITURE STATEMENT
TO BE PROVIDED TO BOARD OF GOVERNORS MEMBERS**

1. Do the pledged revenues reported contain any overhead assessments ? If yes, please explain.
No. The pledge revenues reported do not contain overhead assessments

2. Do pledged revenues or expenditures change year over year 10% or more ? If yes, please explain.
Yes; total expenditures changed by more then 10% due to: filling several open positions, special capital projects as well as several repair and preventative maintenance projects.

3. Please explain amounts categorized as "other".
Expenditures "Other Outflows & Transfers Out" - Overhead assessment expense

4. Add lines as needed for additional university comments. This information will be shared with Board of Governors members.



Agenda Item: FL 109

USF Board of Trustees
December 3, 2019

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

Workgroup Review Date:

Academic and Campus Environment Work Group – November 20, 2019

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

- Memorandum to Jordan B. Zimmerman, Chair, USF Board of Trustees
- Tenure Nominations as a Condition of Employment
- Faculty Profiles

USF System or Institution specific: USF Tampa

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

Agenda Item: III.c.

USF Board of Trustees
December 3, 2019

Issue: Degree Productivity

Proposed action: Information Item

Executive Summary:

Annual Report on Degree Productivity. Related Action Items for termination of degree programs are:

- CIP 09.0401 Journalism – Masters
- CIP 11.0103 Information Technology – Bachelors
- CIP 13.0101 Education, General – Masters
- CIP 52.0601 Business Economics - Bachelors

Financial Impact: No financial impact.

Strategic Goal(s) Item Supports: USF Tampa 1: Student Success; USFSP 2: Student Success & Culture; USFSM Goal: Student Access & Success

BOT Committee Review Date: 11/20/2019 ACE

Supporting Documentation Online (please circle):

Yes

No

- Degree Program Productivity 2019 Report.pptx
- Fall 2019 USF System Full Report – Fall 2019.pdf
- Fall 2019 USF System Fall 2019 Responses.pdf

USF System or Institution specific: USF System

Prepared by: Theresa Chisolm, Ph.D., Vice Provost Strategic Planning, Performance, Accountability, USF Tampa

Agenda Item: III.c.

USF Board of Trustees
December 3, 2019

Issue: Degree Productivity

Proposed action: Information Item

Executive Summary:

Annual Report on Degree Productivity. Related Action Items for termination of degree programs are:

- CIP 09.0401 Journalism – Masters
- CIP 11.0103 Information Technology – Bachelors
- CIP 13.0101 Education, General – Masters
- CIP 52.0601 Business Economics - Bachelors

Financial Impact: No financial impact.

Strategic Goal(s) Item Supports: USF Tampa 1: Student Success; USFSP 2: Student Success & Culture; USFSM Goal: Student Access & Success

BOT Committee Review Date: 11/20/2019 ACE

Supporting Documentation Online (please circle):

Yes

No

- Degree Program Productivity 2019 Report.pptx
- Fall 2019 USF System Full Report – Fall 2019.pdf
- Fall 2019 USF System Fall 2019 Responses.pdf

USF System or Institution specific: USF System

Prepared by: Theresa Chisolm, Ph.D., Vice Provost Strategic Planning, Performance, Accountability, USF Tampa

Degree Productivity Annual Review

AY 2018-19

Academic & Campus Environment Committee
November 20, 2019

Mesa Chisolm, Ph.D.
Provost – Strategic Planning, Performance, &
Sustainability



UNIVERSITY OF SOUTH FLORIDA
A PREEMINENT RESEARCH UNIVERSITY

Principles of Degree Program Review

Ongoing, systematic and rigorous internal review of degree programs every 7 years, aligned with specialized accreditation (FL BOG Regulation 8.015 and USF System Policy 10-062)

- Tracking: (a)degrees, (b) enrollments, (c) graduate school placement, (d) job placement, and, (e) earnings

Degree Productivity Review:

- Periodic BOG & annual internal review
- Balancing degree productivity data
 - a. across level/type;
 - b. general education needs; and
 - c. research productivity

Total Number of Degrees in Last 5-Years		
Degree Level	BOG Threshold	USF Threshold
Bachelors	30	45
Masters	20	30
Doctoral	10	15

With consolidation: One Degree Program across all campuses

- Degree Program productivity review as *“One University Geographically Distributed”* rather than separately for each campus.

Terminated Degree Programs

Last 5 Academic Years (AY 2014-15 to AY 2018-19)

= 33

Program	Date	Program	Date
Undergraduate (n = 18)		Masters (n = 13)	
13.1001 Special Education, General	Fa 2015	13.1005 Education of Emotionally Handicapped	Su 2014
13.1202 Elementary Teacher Education	Su 2014	13.1006 Education of Mental Handicapped	Su 2014
30.9999 Interdisciplinary Studies	Su 2014	13.1011 Education of Learning Disabled	Su 2014
52.0601 Business Managerial Economics	Su 2014	16.1200 Classics	Su 2014
51.0913 Athletic Training	Fa 2014	51.3201 Bioethics & Medical Humanities	Su 2014
11.0401 Computer Info. Systems	Fa 2015	13.1210 Early Childhood Education	Su 2014
13.1001 Exceptional Student Education	Fa 2015	13.1001 Exceptional Student Education	Fa 2015
13.1305 English Teacher Education	Fa 2015	05.0102 American Studies	Fa 2015
13.1306 Foreign Language Teacher Education	Sp 2016	14.0101 Engineering, General	Fa 2015
05.0102 American Studies	Fa 2016	13.1315 Reading Teacher Education	Su 2017
16.0901 French	Fa 2016	09.0401 Journalism	Fa 2017
16.0501 German	Fa 2016	52.1501 Real Estate	Sp 2019
16.0902 Italian	Fa 2016	51.3804 Nurse Anesthesia	Sp 2019
16.0402 Russian	Fa 2016		
16.0905 Spanish	Fa 2016		
16.1200 Classics	Fa 2016	Doctorate (n = 2)	
52.0201 Business, General	Su 2017	26.0101 Biology	Fa 2013
13.1210 Early Childhood Education	Su 2017	14.0101 Engineering General	Su 2019

New Degree Programs

n = 19

Name	Implemented
Undergraduate (n = 6)	
26.0101 Biology/Biological Sciences (SM)	Fa 2014
16.0101 World Languages & Culture	Fa 2016
09.0900 Integrated Public Relations & Advertising	Fa 2018
52.1701 Risk Management/Insurance	Fa 2018
14.0501 Biomedical Engineering	Sp 2019
27.0304 Mathematics: Computational & Applied	Sp 2019
Masters (n = 10)	
11.0401 Information Studies	Fa 2014
43.0303 Cybersecurity	Fal2014
51.0912 Physician's Assistant	Su 2015
51.0913 Athletic Training/Trainer	Su 2015
52.0301 Accountancy (St. Petersburg)	Sp 2015
51.3804 Nurse Anesthetist	Fa 2015
51.2099 Pharmaceutical Nanotechnology	Sp 2016
26.1307 Conservation Biology	Fa 2017
09.0903 Advertising	Fa 2018
13.0501 Learning Design & Technology	Fa 2018
Doctoral (n = 3)	
51.2314 Rehabilitative Sciences	Fa 2014
16.0102 Linguistics & Appl. Language Studies	Fa 2016
51.2212 Behavioral & Community Sciences	Fa 2017

mentation:

bersecurity (B - Fall 2019)

stainability Studies (B - Fall 2019)

ply Chain Management (B, M - Fall 2019)

vironmental Chemistry (B - Fall 2020)

ormatics & Big Data Analytics (R - Spring 2020)



Two Documents

Academic Program Productivity Report

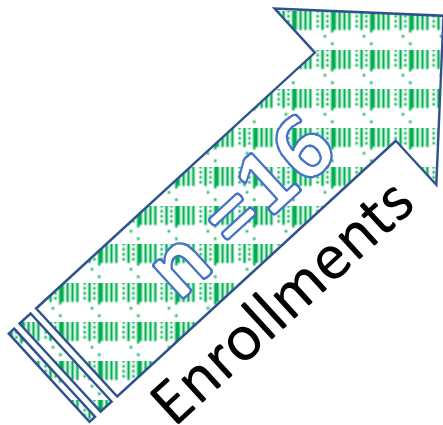
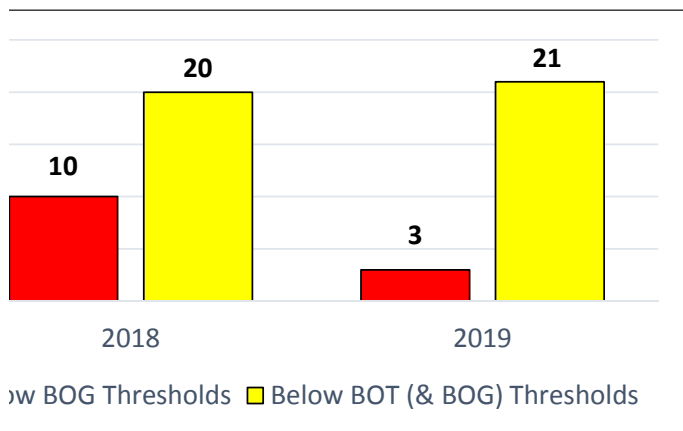
Degree CIP	Program Title	Degree	Status	Total Degrees
13.0104	Environmental Science	Bachelor	●	652
		Masters	●	76
13.0301	City/Urban & Regional Planning	Masters	●	57

Academic Program Productivity Report: Responses


College	Degree CIP	Program Title	Degree	Status	Total Degrees	Fall 2019 Preliminary Enrollment	Strategic Emphasis	2019 Comments
	04.0401	Environmental Design/Architecture	Masters	●	27	7	STEM	The faculty is in the process of streamlining using the MUCD program and program greater focus. The required credit hours will likely be reduced to 39, making the program more competitive and enabling students to complete the program in a calendar year or less. This makes the USF SACD MUCD program more competitive in the larger urban design degree marketplace and of and mid-career applicants the ability to complete the program in a real time frame relative to career track / commitments.
	13.0312	Music Teacher Education	Masters	●	17	15	Education	This program underwent a significant revision in 2017, resulting in the elimination of the previous curriculum and the launch of the new requirements. As the 5-year degree total should reflect the shortened timeframe. The program has already demonstrated growth with 15 enrolled in Fall 2019 (compared to 7 in Fall 2018). 7 students graduated in Summer 2019; we anticipate another 7 students will graduate this academic year. Faculty are engaged in active recruitment to this program and are working to establish a partnership with a university in China, where there is a tremendous demand for this type of degree. We anticipate the enrollment will increase noticeably when that partnership is established within the next two years and thus falling under the full 5-year cycle for the revised program with a concomitant increase in the number of degrees awarded.

Thresholds Based on Total Degrees Awarded Over Five-Year Period	
BOG Performance Threshold: Baccalaureate = 30; Masters = 20; Doctoral = 10	
USF Performance Threshold: Baccalaureate = 45; Masters = 30; Doctoral = 15	
●	Does not meet USF or Florida BOG productivity thresholds for degrees awarded
●	Does not meet USF productivity thresholds for degrees awarded
●	Meets USF and BOG productivity thresholds for degrees awarded

Results



n = 3 
MASTERS & PHD STUDIES

 **PROGRAM REVIEW**
n = 3

Program Recommended for Termination

Programs based on productivity:

- 09.0401 Journalism - Masters
- 13.0101 Education General - Masters

Programs based on curricular alignment for consolidation of SACSCC accreditation:

- 11.0103 Cybersecurity & Information Technology - Bachelors
 - In S-M ONLY; CIP remains in Tampa as ABET accredited program
 - New major in CIP 52.1201 Management Information Systems
- 52.0601 Business/Managerial Economics -Bachelors
 - Alignment between St. Petersburg & Tampa to offer Economics only through CIP 45.0601 Economics, General






UNIVERSITY OF SOUTH FLORIDA
A PREEMINENT RESEARCH UNIVERSITY

University of South Florida System

Academic Program Productivity Report Fall 2019

Includes
Degrees Awarded for Academic Years
Fall 2014 - Spring 2019

Thresholds Based on Total Degrees Awarded Over Five-Year Period	
BOG Performance Threshold: Baccalaureate = 30; Masters = 20; Doctoral = 10 USF Performance Threshold: Baccalaureate = 45; Masters = 30; Doctoral = 15	
	Does not meet USF or Florida BOG productivity thresholds for degrees awarded
	Does not meet USF productivity thresholds for degrees awarded
	Meets USF and BOG productivity thresholds for degrees awarded

Report Produced by
USF System Office of Decision Support
Institutional Effectiveness
November 20, 2019

College	Degree CIP	Program Title	Degree	Status	Total Degrees
Arts & Sciences					
	03.0104	Environmental Science	Bachelor	●	652
			Masters	●	76
	04.0301	City/Urban & Regional Planning	Masters	●	57
	05.0107	Latin American Studies	Masters	●	25
	05.0201	African-American/Black Studies	Bachelor	●	30
	05.0207	Womens Studies	Bachelor	●	74
			Masters	●	30
	09.0101	Speech Communication and Rhetoric	Bachelor	●	1,159
			Doctoral - R	●	34
			Masters	●	22
	09.0102	Mass Communication/Media Studies	Bachelor	●	1,417
			Masters	●	65
	09.0401	Journalism	Masters	●	26
	09.0499	Journalism, Other	Masters	●	69
	09.0900	Public Relations, Advertising, & Applied Communication	Bachelor	New academic program	13
	09.0903	Advertising	Masters	New academic program	0
	11.0103	Information Studies	Bachelor	●	157
	11.0401	Information Science/Studies	Masters	●	60

College	Degree CIP	Program Title	Degree	Status	Total Degrees
	16.0101	Foreign Languages and Literatures, General	Bachelor	●	77
	16.0102	Linguistics	Doctoral - R	New academic program	1
			Masters	●	65
	16.0901	French Language and Literature	Masters	●	21
	16.0905	Spanish Language and Literature	Masters	●	42
	23.0101	English Language and Literature, General	Bachelor	●	1,068
			Doctoral - R	●	40
			Masters	●	43
	23.1302	Creative Writing	Masters	●	41
	23.1303	Professional, Technical, Business, and Scientific Writing	Bachelor	●	57
	24.0101	Liberal Arts and Sciences/Liberal Studies	Masters	●	90
	24.0103	Humanities/Humanistic Studies	Bachelor	●	107
	25.0101	Library and Information Science	Masters	●	406
	26.0101	Biology/Biological Sciences, General	Bachelor	●	2,012
			Masters	●	93
	26.0102	Biomedical Sciences, General	Bachelor	●	3,002
	26.0406	Cell/Cellular and Molecular Biology	Doctoral - R	●	31
	26.0503	Medical Microbiology and Bacteriology	Bachelor	●	208
			Masters	●	36

College	Degree CIP	Program Title	Degree	Status	Total Degrees
	26.0911	Oncology and Cancer Biology	Doctoral - R	●	28
	26.1307	Conservation Biology	Masters	New academic program	1
	26.1399	Ecology, Evolution, Systematics and Population Biology, Other	Doctoral - R	●	10
	27.0101	Mathematics, General	Bachelor	●	235
			Doctoral - R	●	43
			Masters	●	48
	27.0304	Computational and Applied Mathematics	Bachelor	New academic program	0
	27.0501	Statistics, General	Bachelor	●	105
			Masters	●	41
	30.0101	Biological and Physical Sciences	Bachelor	●	141
	38.0101	Philosophy	Bachelor	●	124
			Doctoral - R	●	38
			Masters	●	23
	38.0201	Religion/Religious Studies	Bachelor	●	76
			Masters	●	22
	40.0501	Chemistry, General	Bachelor	●	344
			Doctoral - R	●	76
			Masters	●	25
	40.0601	Geology/Earth Science, General	Bachelor	●	167

College	Degree CIP	Program Title	Degree	Status	Total Degrees
			Doctoral - R	●	25
			Masters	●	47
	40.0801	Physics, General	Bachelor	●	151
			Doctoral - R	●	49
			Masters	●	46
	42.0101 (includes 42.9999)	Psychology, General	Bachelor	●	3,448
			Doctoral - R	●	83
			Masters	●	220
	44.0401	Public Administration	Masters	●	130
	45.0101	Social Sciences, General	Bachelor	●	803
	45.0201	Anthropology	Bachelor	●	430
			Doctoral - R	●	49
			Masters	●	76
	45.0601	Economics, General	Bachelor	●	657
			Doctoral - R	●	14
			Masters	●	71
	45.0701	Geography	Bachelor	●	83
			Masters	●	20
	45.0799	Geography, Other	Doctoral - R	●	26

College	Degree CIP	Program Title	Degree	Status	Total Degrees
	45.0901	International Relations and Affairs	Bachelor	●	642
			Doctoral - R	●	15
	45.1001	Political Science and Government, General	Bachelor	●	863
			Masters	●	64
	45.1101	Sociology	Bachelor	●	416
			Doctoral - R	●	16
			Masters	●	23
	51.1005	Clinical Lab Science/Medical Technology/Technologist	Bachelor	●	35
	54.0101	History, General	Bachelor	●	666
			Doctoral - R	●	13
			Masters	●	48
College of the Arts					
	04.0201	Architecture	Masters	●	203
	04.0401	Environmental Design/Architecture	Masters	●	27
	13.1312	Music Teacher Education	Bachelor	●	94
			Masters	●	17
	50.0301	Dance, General	Bachelor	●	73
	50.0409	Graphic Design	Bachelor	●	85
	50.0501	Drama and Dramatics/Theatre Arts, General	Bachelor	●	153

College	Degree CIP	Program Title	Degree	Status	Total Degrees
	50.0701	Art/Art Studies, General	Bachelor	●	187
	50.0702	Fine/Studio Arts, General	Bachelor	●	156
			Masters	●	50
	50.0703	Art History, Criticism and Conservation	Bachelor	●	65
			Masters	●	18
	50.0901	Music, General	Doctoral - R	●	12
	50.0903	Music Performance, General	Bachelor	●	65
			Masters	●	130
	50.9999	Visual and Performing Arts, Other	Bachelor	●	103
College of Behavioral and Community Sciences					
	30.1101	Gerontology	Bachelor	●	96
			Doctoral - R	●	10
			Masters	●	36
	42.2814	Applied Behavior Analysis	Doctoral - R	New academic program	12
			Masters	New academic program	70
	43.0103	Criminal Justice/Law Enforcement Administration	Masters	●	126
	44.0000	Human Services, General	Bachelor	●	416
			Masters	New academic program	44
	44.0701	Social Work	Bachelor	●	416

College	Degree CIP	Program Title	Degree	Status	Total Degrees
			Doctoral - R	●	10
			Masters	●	480
	45.0401	Criminology	Bachelor	●	1,962
			Doctoral - R	●	23
			Masters	●	42
	51.0202	Audiology/Audiologist	Doctoral - R	●	64
		Audiology/Audiologist and Speech-Language Pathology/Pathologist	Bachelor	●	878
	51.0204 (includes 51.0201 for B only)		Doctoral - R	●	11
			Masters	●	336
	51.0701	Health/Health Care Administration/Management	Bachelor	●	46
	51.2212	Behavioral Aspects of Health	Doctoral - R	New academic program	0
	51.2310	Vocational Rehabilitation Counseling/Counselor	Masters	●	203
College of Business					
	11.0103	Cybersecurity & Information Technology	Bachelors	New academic program	112
	11.0501	Computer Systems Analysis/Analyst	Masters	●	731
	31.0504	Sport and Fitness Administration/Management	Masters	●	121
	52.0101	Business/Commerce, General	Bachelor	●	1,444
			Masters	●	95
	52.0201	Business Administration and Management, General	Bachelor	●	683

College	Degree CIP	Program Title	Degree	Status	Total Degrees
			Doctoral - R	●	99
			Masters	●	1,362
	52.0301	Accounting	Bachelor	●	1,658
			Masters	●	355
	52.0601	Business/Managerial Economics	Bachelor	Suspended Program	153
	52.0701	Entrepreneurship/Entrepreneurial Studies	Bachelor	●	85
			Masters	●	233
	52.0801	Finance, General	Bachelor	●	2,016
			Masters	●	300
	52.0901	Hospitality Administration/Management, General	Bachelor	●	225
			Masters	●	50
	52.1101	International Business/Trade/Commerce	Bachelor	●	289
	52.1201	Management Information Systems, General	Bachelor	●	789
	52.1401	Marketing/Marketing Management, General	Bachelor	●	1,714
			Masters	●	171
	52.1499	Marketing, Other	Bachelor	●	32
	52.1701	Insurance	Bachelor	New academic program	0
College of Education					
	13.0101	Education, General	Masters	●	23

College	Degree CIP	Program Title	Degree	Status	Total Degrees
	13.0301	Curriculum and Instruction	Doctoral - R	●	245
			Specialist	●	55
			Masters	●	421
	13.0401	Educational Leadership and Administration, General	Doctoral - R	●	18
			Specialist	●	16
			Masters	●	311
	13.0501	Educational/Instructional Technology	Masters	New academic program	0
	13.1001	Special Education and Teaching, General	Bachelor	●	92
			Masters	●	104
	13.1004	Education/Teaching of the Gifted and Talented	Masters	●	25
	13.1013	Education/Teaching of Individuals with Autism	Masters	●	27
	13.1101	Counselor Ed./School Counseling & Guidance Services	Masters	●	133
	13.1201	Adult and Continuing Education and Teaching	Masters	●	102
	13.1202	Elementary Education and Teaching	Bachelor	●	842
			Masters	●	196
	13.1203	Jr High/Intermediate/Middle School Ed & Teaching	Masters	●	32
	13.1206	Teacher Education, Multiple Levels	Bachelor	●	334
	13.1210	Early Childhood Education and Teaching	Bachelor	●	119
	13.1305	English/Language Arts Teacher Education	Bachelor	●	186

College	Degree CIP	Program Title	Degree	Status	Total Degrees
			Masters	●	97
	13.1306	Foreign Language Teacher Education	Masters	●	8
	13.1311	Mathematics Teacher Education	Bachelor	●	125
			Masters	●	37
	13.1314	Physical Education Teaching and Coaching	Bachelor	●	215
			Masters	●	87
	13.1315	Reading Teacher Education	Masters	●	127
	13.1316	Science Teacher Education/General Science Teacher Edu	Bachelor	●	49
			Masters	●	33
	13.1317	Social Science Teacher Education	Bachelor	●	157
			Masters	●	26
	13.1320	Trade and Industrial Teacher Education	Masters	●	50
	13.1401	Teaching English as a Second or Foreign Language/ESL Language Instructor	Doctoral - R	●	25
	31.0505	Kinesiology and Exercise Science	Masters	●	89
	42.2805	School Psychology	Doctoral - R	●	28
			Masters	●	45
College of Engineering					
	11.0101	Computer and Information Sciences, General	Bachelor	●	584
	11.0103	Information Technology	Bachelor	●	408

College	Degree CIP	Program Title	Degree	Status	Total Degrees
			Masters	●	46
	11.0701	Computer Science	Masters	●	202
	14.0501	Bioengineering and Biomedical Engineering	Bachelor	●	0
			Doctoral - R	●	17
			Masters	●	99
	14.0701	Chemical Engineering	Bachelor	●	519
			Doctoral - R	●	18
			Masters	●	39
	14.0801	Civil Engineering, General	Bachelor	●	481
			Doctoral - R	●	40
			Masters	●	239
	14.0901	Computer Engineering, General	Bachelor	●	241
			Doctoral - R	●	45
			Masters	●	50
	14.1001	Electrical and Electronics Engineering	Bachelor	●	432
			Doctoral - R	●	80
			Masters	●	684
	14.1401	Environmental/Environmental Health Engineering	Doctoral - R	●	17
			Masters	●	63

College	Degree CIP	Program Title	Degree	Status	Total Degrees
	14.1801	Materials Engineering	Masters	●	56
	14.1901	Mechanical Engineering	Bachelor	●	854
			Doctoral - R	●	38
			Masters	●	250
	14.3501	Industrial Engineering	Bachelor	●	297
			Doctoral - R	●	24
			Masters	●	136
	15.1501	Engineering/Industrial Management	Masters	●	280
Graduate Studies					
	43.0303	Critical Infrastructure Protection	Masters	●	392
College of Marine Science					
	40.0607	Oceanography, Chemical and Physical	Doctoral - R	●	45
			Masters	●	56
College of Medicine					
	26.1103	Bioinformatics	Masters	●	36
	26.1201	Biotechnology	Masters	●	51
	26.9999	Biological and Biomedical Sciences, Other	Doctoral - R	●	78
			Masters	●	1,363
	51.0912	Physician Assistant	Masters	New academic program	30

College	Degree CIP	Program Title	Degree	Status	Total Degrees
	51.0913	Athletic Training/Trainer	Masters	●	69
	51.1201	Medicine	Doctoral - P	●	785
	51.2308	Physical Therapy/Therapist	Doctoral - P	●	412
	51.2314	Rehabilitation Science	Doctoral - R	Suspended Program	0
	51.2706	Medical Informatics	Masters	●	326
College of Nursing					
	51.3801	Registered Nursing/Registered Nurse	Bachelor	●	2,662
			Masters	●	1,367
	51.3808	Nursing Science	Doctoral - R	●	30
	51.3818	Nursing Practice	Doctoral - P	●	173
College of Global Sustainability					
	30.3301	Sustainability Studies	Masters	●	310
College of Pharmacy					
	51.2001	Pharmacy	Doctoral - P	●	395
	51.2099	Pharmacy, Pharmaceutical Sciences and Administration, Other	Masters	New academic program	17
College of Public Health					
	51.0000	Health Services/Allied Health/Health Sciences, General	Bachelor	●	3,711
	51.0701	Health/Health Care Administration/Management	Masters	●	68
	51.2201	Public Health, General	Bachelor	●	1,550



College	Degree CIP	Program Title	Degree	Status	Total Degrees
			Doctoral - R	●	102
			Masters	●	1,058
	51.2299	Public Health, Other	Masters	●	87
Undergraduate Studies					
	24.0101	Liberal Arts and Sciences/Liberal Studies	Bachelor	●	935

University of South Florida

Academic Program Productivity Report: Comments Fall 2019

Includes

**Degrees Awarded for Academic Years
Fall 2014 - Spring 2019**

Thresholds Based on Total Degrees Awarded Over Five-Year Period	
BOG Performance Threshold: Baccalaureate = 30; Masters = 20; Doctoral = 10 USF Performance Threshold: Baccalaureate = 45; Masters = 30; Doctoral = 15	
	Does not meet USF or Florida BOG productivity thresholds for degrees awarded
	Does not meet USF productivity thresholds for degrees awarded

**Report Produced by
USF System Office of Decision
Support Institutional Effectiveness
November 20, 2019**

Board of Trustees Regular Meeting - New Business - Consent Agenda

College	Degree CIP	Program Title	Degree	Status	Total Degrees	Fall 2019 Preliminary Enrollment	Strategic Emphasis	2019 Comments
Arts & Sciences								
	05.0107	Latin American Studies	Masters	●	25	6		This currently small interdisciplinary program has not had the focused attention of the many other degree programs housed in the new School of Interdisciplinary Global Studies. However the new Director of the Institute for Latin American Studies has developed a comprehensive proposal to have a group of our CAS faculty with research and teaching interests in the area of Latin America take a larger role in recruiting for and administering the program. They intend to market the many career opportunities available with this masters. As this comes to pass the program enrollments should once again rise. The college is interested in having a thriving program in this important area and once the faculty have developed the projected organization we will support the program with additional resources.
	05.0201	African-American/Black Studies	Bachelor	●	30	13		The program has been revitalized within the School of Interdisciplinary Global Studies with enrollment continuing to rise. This should lead to increasing number of graduates with 3 students having applied for fall and more expected to graduate in spring. This should keep the degrees awarded near 30 over five years and well above the BOG threshold of 20/5yrs.
	09.0101	Speech Communication and Rhetoric	Masters	●	22	7	Gap Analysis	Enrollments have been between 7 and 8 students per year over the past three years resulting in 3-4 degrees per year. With two graduates this past summer they are on track to easily maintain this output and stay well above the BOG threshold. The Masters program is intentionally small and has been a major feeder for their much larger and robust PhD program.
	09.0401	Journalism	Masters	●	26	2		This degree program was suspended and replaced with the Digital Journalism degree. This program is teaching out the few remaining students left in the program. One student is graduating this semester and the second student will graduate in the next year.
	16.0901	French Language and Literature	Masters	●	21	8	Global	Enrollments have remained stable over the past three years at 8 students per year. This has resulted in 3-6 graduates per year over that time keeping the program over the BOG minimum. A program review is slated for this year and among the items to be explored with the reviewer are recruitment strategies and curriculum modifications that would increase student demand.
	26.1399	Ecology, Evolution, Systematics and Population Biology, Other	Doctoral - R	●	10	33		After several years of low enrollments (10-18 from 2014-2016) the program has reached a graduate population of over 30 which will put them back on track to graduate 4-6 students per year. The program has already graduated one student this past summer with two more graduation applications for this fall.
	38.0101	Philosophy	Masters	●	23	3		The Philosophy department's main focus is on the much larger PhD program which consumes the majority of the resources (both faculty and TA stipends). Nevertheless the direct entry Masters program is viewed as an important source of proven graduate students for the PhD program. However to supplement the masters degrees awarded in this program the current plan is for the students in the PhD program who successfully complete the departments new candidacy requirements (which meet all of the requirements for the masters degree) to be granted a Masters degree along the way. This will increase their degrees awarded to 5-6 per year which will put them well above the BOG minimums.

Board of Trustees Regular Meeting - New Business - Consent Agenda

College	Degree CIP	Program Title	Degree	Status	Total Degrees	Fall 2019 Preliminary Enrollment	Strategic Emphasis	2019 Comments
	38.0201	Religion/Religious Studies	Masters	●	22	9		Enrollments have increased over the past three years with the program making a concerted effort to recruit. A shift in focus of the curriculum and research to religion and conflict/religion and politics has made the program more relevant and attractive to today's students.
	40.0501	Chemistry, General	Masters	●	25	3		Default degree for strong PhD program. Very few students admitted directly to masters as PhD is the focus.
	45.0601	Economics, General	Doctoral - R	●	14	24		The enrollment have remained stable between 22-24 over the past three years with 3-4 degree awarded each year. Two students have applied to graduate in fall so they look to remain in this steady state well above the BOG limit for the near future. With the number of enrollments largely limited by the availability of PhD stipends CAS increased the total by two additional lines so the number of graduates over time will increase.
	45.0701	Geography	Masters	●	20	6		The program continues on the rebound with plans to hire another faculty in this area. Graduates are highly employable and recent stipend increases should also help attract additional students. One student has already graduated this past summer with 1 more anticipated this fall. The spring masters graduates are typically the largest group so they should remain above the BOG minimum for 2019/20.
	45.1101	Sociology	Masters	●	23	23		Enrollments have been stable for several years and this is also reflected in the degrees awarded (3-6 degrees per year). They are on track this year to graduate 3-6 masters students which will keep them above the BOG minimum.
	54.0101	History, General	Doctoral - R	●	13	30		The History PhD enrollment numbers have stabilized at about 30 or more for several years and the degrees awarded have begun to reflect the programs focus on students successfully completing the degree in a timely manner. They have graduated 5 students per year for the past two years and are on track to replicate these numbers with 3 students applying to graduate in fall with more expected in spring. This type of consistent and sustainable performance will soon have them above the BOG minimum.

College of the Arts								
	04.0401	Environmental Design/Architecture	Masters	●	27	7	STEM	The faculty is in the process of streamlining the MUCD program and giving the program greater focus. The required credit hours will likely be reduced from 45 to 39, making the program more competitive and enabling students to complete the program in a calendar year or less. This makes the USF SACD MUCD program more competitive in the larger urban design degree marketplace and offers early and mid-career applicants the ability to complete the program in a reasonable time frame relative to career track / commitments.

Board of Trustees Regular Meeting - New Business - Consent Agenda

College	Degree CIP	Program Title	Degree	Status	Total Degrees	Fall 2019 Preliminary Enrollment	Strategic Emphasis	2019 Comments
	13.1312	Music Teacher Education	Masters	●	17	15	Education	This program underwent a significant revision in 2017, resulting in the suspension of the previous curriculum and the launch of the new requirements. As a result, the 5-year degree total should reflect the shortened timeframe. The enrollment has already demonstrated growth with 15 enrolled in Fall 2019 (compared to 9 in Fall 2018). 7 students graduated in Summer 2019; we anticipate another 7 students will graduate this academic year. Faculty are engaged in active recruitment to this program and are working to establish a partnership with a university in China, where there is a tremendous demand for this type of program. We anticipate the enrollment will increase noticeably when that partnership is in place (anticipated within the next two years and thus falling under the first complete 5-year cycle for the revised program) with a concomitant increase in the number of degrees awarded.
	50.0703	Art History, Criticism and Conservation	Masters	●	18	15		New procedures, such as the accelerated MA (BA to MA), accelerated graduation, and enhanced recruiting are already working: 7 art history MA students are scheduled to graduate in 2019-20, for a total of 21 in the 5-year period o 2014-2020, thereby meeting the BOG performance threshold by the end of this academic year. Seven (7) students were admitted to the program for Fall 2019. With accelerated graduation, the art history program should meet or exceed the BOT performance threshold in 2020-2021. In addition, enhancements to recruiting are being pursued further, such as new recruiting materials and expanded contact lists.
	50.0901	Music, General	Doctoral - R	●	12	14		There is a continuing upward trend in new student enrollment over the last three fall semesters. We expect that the enrollment will continue to be higher than the years previous to those three, when enrollment was down due to lower enrollment trends in the field. We also are anticipating a partnership with an outstanding music conservatory in China, where there is a significant student base for recruitment into the program. The enrollment is expected to increase further when the partnership is in place, and the graduation rate will rise in tandem with the increased enrollment.
College of Behavioral and Community Sciences								
	44.0701	Social Work	Doctoral - R	●	10	3		The PhD was suspended in 2012 until it was just revised/opened again for enrollment Fall 2019, contributing to the low degree productivity. We are actively recruiting students for Fall 2020.
	51.0204 (includes 51.0201)	Audiology/Audiologist and Speech-Language Pathology/Pathologist	Doctoral - R	●	11	16	Health	Increased marketing efforts including intensified marketing of the Aud/ PhD Dual degree this academic year. However, a decline in the #of tenure track faculty has prevented finding good matches from some interested student. Expect a marked increase in graduates this academic year (approximately 6). A significant shortage of Ph.D.s in CSD assures 100% employed upon graduation in academia, clinical settings, and industry.
College of Education								
	13.0101	Education, General	Masters	●	23	9	Education (coming off PSE list)	USFSM supports discontinuance of CIP 13.0101 Education, General. Only one track has been active in this degree (Online Teaching and Learning), and that degree is being subsumed by Tampa's MS in Learning Design and Technology (different CIP).

Board of Trustees Regular Meeting - New Business - Consent Agenda

College	Degree CIP	Program Title	Degree	Status	Total Degrees	Fall 2019 Preliminary Enrollment	Strategic Emphasis	2019 Comments
	13.1004	Education/Teaching of the Gifted and Talented	Masters	●	25	7	Education	We've hired a marketing and recruitment coordinator for graduate education programs. Current enrollment in the program is 7. Degree productivity is above the BOG threshold and we expect it to be over the USF threshold this year.
	13.1013	Education/Teaching of Individuals with Autism	Masters	●	27	19	Education	We've hired a marketing and recruitment coordinator for graduate education programs. We have had a lot of interest in the program as a result of our marketing efforts. Current enrollment in the program is 19. Degree productivity is above the BOG threshold and we expect it to be over the USF threshold this year.
	13.1306	Foreign Language Teacher Education	Masters	●	8	6	Education	We combined the FLE MAT program with the MEd in Curriculum and Instruction under one CIP. The changes have been accepted at all levels and are reflected in the 2019-2020 catalog.
	13.1317	Social Science Teacher Education	Masters	●	26	12	Education	We've hired a marketing and recruitment coordinator for graduate education programs. Current enrollment in the program is 12. Degree productivity is above the BOG threshold and we expect it to be over the USF threshold this year.

Agenda Item: FL 111

USF Board of Trustees
December 3, 2019

Issue: Bachelor of Science in Cell and Molecular Biology – CIP 26.0406

Proposed action: Approval

Executive Summary:

The Bachelor of Science in Cell and Molecular Biology will provide a strong foundation in general biology with an emphasis on biomedical-related areas and focusing on the cellular and molecular processes that occur within cells. It will be the first undergraduate program in CIP Code 26.0406 in the State University System.

Financial Impact:

There will be no financial impact because existing faculty and resources will be reallocated for this new degree program.

Strategic Goal(s) Item Supports:

Strategic Plan Goal 1: Well-educated and highly skilled global citizens through our continuing commitment to student success.

BOT Committee Review Date: November 20, 2019

Supporting Documentation Online (please circle):

Yes

No

USF System or Institution specific: University of South Florida

Prepared by: James Riordan, Ph.D., Instructor II, CMMB Director of Undergraduate Studies

**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

Summer 2020
Proposed Implementation Term

College of Arts and Sciences
Name of College(s) or School(s)

Department of Cell Biology,
Microbiology, and Molecular Biology
Name of Department(s)/ Division(s)

Cell and Molecular Biology
Academic Specialty or Field

Bachelor of Science in Cell and
Molecular Biology
Complete Name of Degree

26.0406
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	799	719	\$2,059	\$1,480,433	0	0	\$1,480,433
Year 2	900	810					
Year 3	976	878					
Year 4	1,097	987					
Year 5	1,161	1,045	\$1,533	\$1,602,054	0	0	\$1,602,054

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.**

Level: The proposed degree program will be at the undergraduate level and will be a BS degree. This degree will be the first BS degree in Cell and Molecular Biology housed in a public university in the state of Florida. The proposed degree was developed from an existing major under the General Biology, CIP code 26.0101. The current major will be discontinued once the new degree program is in place.

Emphasis, including concentrations, tracks, or specializations: The new Cell and Molecular Biology (CAM) degree program will provide a strong foundation in general biology with an emphasis on biomedical-related areas, and focusing on the cellular and molecular processes that occur within cells. Many recent breakthroughs in this field have shed light on how cells function in the context of the whole organism. The fields of genomics/computational biology are contributing knowledge to underlying gene regulation, cell-cell interactions, and organismal-environmental interactions. Advances in cell and molecular biology are leading to new treatments for age-related diseases including cancer. There will be no concentrations, tracks, or specializations.

Total number of credit hours: This degree requires 120 credit hours--39 credit hours in the major.

Overall purpose (including employment and education opportunities to program graduates): Students are drawn to this area of biology due to the diversity of course offerings, with a strong emphasis in Cell and Molecular Biology courses, along with multiple career options, such as biologist, biochemist, medical scientist, biological technician, clinical technician, research associate, and laboratory technologist and high school biology teachers following graduation. This new degree program will prepare students for professional careers in the areas of Cell Biology and Molecular Biology, including entrance to medical school, dental school, graduate school, as well as careers in biotechnology, science policy, biomedical research, teaching, science writing and illustration. The CAM degree will also host a vibrant student organization promoting networking with faculty both within and outside USF.

- 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 to the CAVP Academic Program Coordination review group on April 23rd, 2019. No concerns by the CAVP review group were raised with respect to the pre-proposal.

- 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.

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 CAM degree will help achieve strategic goals of the university by providing affordable, accessible, and pedagogically structured education and research programs. It addresses the SUS emphasis on producing STEM degrees, which is a priority area for the state. The strategic emphasis on Cell and Molecular Biology supports the University’s commitment to strengthening the biomedical areas. Florida has identified STEM degrees as a priority for the development of the state. Therefore, this degree directly addresses the challenge to produce more STEM graduates.

The CAM degree directly meets the following high-level SUS Strategic Planning goals (indicated by double checks) and also indirectly meets other goals as well (indicated by single checks).

PRIORITIES OF THE STATE UNIVERSITY SYSTEM (SUS)			
SUS GOALS	EXCELLENCE	PRODUCTIVITY	STRATEGIC PRIORITIES FOR A KNOWLEDGE ECONOMY
Teaching & Learning	√√ Strengthen Quality & Reputation of Academic Programs and Universities	√√ Increase Degree Productivity and Program	√√ Increase the Number of Degrees Awarded in STEM and Other Areas of
Scholarship, Research, & Innovation	√ Strengthen Quality & Reputation of Scholarship, Research, & Innovation	Increase Research and Commercialization Activity	√ Increase Collaboration and External Support for Research Activity
Community & Business Engagement	Strengthen Quality & Recognition of Commitment to Community and Business Engagement	Increase Levels of Community and Business Engagement	√√ Increased Community and Business Workforce

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 category within the Programs of Strategic Emphasis as described in the SUS Strategic Plan is the “Science, Technology, Engineering, and Math (STEM)” category. This category contains six subcategories of which the “Medical Science and Technology” category is the one best suited. The CIP 26 is already

listed in the STEM CIP codes.

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 CAM undergraduate degree will be offered on the Tampa campus at USF in the existing Department of Cell Biology, Microbiology, and Molecular Biology (CMMB) in the College of Arts and Sciences.

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 U.S. Bureau of Labor Statistics has projected a steady growth of 7 percent over the next ten years (2018-2028). In 2018, there were more than 85,000 people employed nationwide as biological technicians in the field, and the median annual wage was \$44,500 (url: <https://www.bls.gov/ooh/life-physical-and-social-science/biological-technicians.htm>, visited 10/4/2019). According to Projections Central, Florida's long-term occupational projections (2016-2026) show a positive increase of 18 percent (url: <https://projectionscentral.com/Projections/LongTerm>, visited 10/4/2019). Many of our current graduates become high school science teachers. The same website indicates a 21.4 percent increase in Biological Science Teachers over the period 2016-2026.

Burning Glass analysis (Appendix C) reveals that in the Tampa-St. Petersburg region, there were 1,240 job postings in the field of cell and molecular biology in 2018-2019. In Florida, there were 5,863 postings, and nationwide there were more than 140,000 job postings in cell and molecular biology.

Graduates of this program usually transition into any of the six different occupation groups as follows: biologist, biochemist, medical scientist, biological technician, clinical technician, research associate, and laboratory technologist.

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.

Data from the USF InfoCenter (<http://usfweb.usf.edu/dss/infocenter/>; visited 5/31/2019) has revealed that since its inception in the fall of 2014, the student headcount in the CAM major has been steadily rising, starting at 634 students in the 2014-2015 academic year, to 799 students in 2018-2019. This represents a growth in student headcount of approximately 5% per year over the past five academic cycles; a trend that is expected to continue in the future.

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.

There are currently no approved undergraduate degree programs for the CIP Code 26.0406 in the Florida

SUS, under which USF currently houses the CAM PhD degree (along with UF). The undergraduate CAM degree is distinct from the General Biology (CIP 26.0101) degree, which is currently offered in Florida across various public institutions: FAMU, FAU, FGCU, FIU, FSU, UCF, UF, UNF, USF, and UWF. In addition, there are no private institutions in Florida with undergraduate programs similar to the proposed CAM degree. The CAM degree would not duplicate any existing program in the University of South Florida, and is thus unique in this manner. While USF offers General Biology degrees at the bachelor's and master's levels, the undergraduate degree currently being offered is in General Biology (CIP 26.0101); the CAM degree being proposed (CIP 26.0406), is a major in Cell and Molecular Biology, which is a significantly more specialized 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 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.**

The proposed Cell and Molecular Biology (CIP Code 26.0406) degree program will replace the existing undergraduate major in Cell and Molecular Biology (CIP 26.0101), which currently has a student headcount of 799. Given that this proposal is primarily to offer the major under the CIP code with which it best aligns, we expect the projected starting enrollment in the new degree program to be the same value of 799. Based on the trend over the past 5 years of enrollments from 2014-2015 to 2018-2019, we project an increase in HC of approximately 100 majors per year for the proposed CAM degree to 1,161 students by year 5 (**Table 1-A**).

The FTE for the new CAM degree program is estimated at 27 credit hours, based on a distribution of both full and part-time students. The projected starting FTE was thus 799, and estimated to increase to 1,161 FTE by year 5 based on increased HC (**Table 1-A**).

Students are not required to change majors for enrollment in the proposed program.

- 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 serves a diverse population, ranking as the 245th most diverse university, out of 2,475 US universities, according to College Factual (<https://www.collegefactual.com/colleges/university-of-south-florida-main-campus/student-life/diversity/#secOverall> - accessed 5/31/19). The current major in Cell and Molecular major was 11% (86/799) Black, 25% (203/799) Hispanic, and 63% (503/799) female in academic year 2018-2019.

The specific steps that CMMB will take to ensure a diverse student body include the following:

1. Work closely with USF Diversity, Inclusion and Equal Opportunity (DIEO) to identify diversity resources.
2. Working with USF Admissions to actively recruit from top high schools nationally with under-represented minority students.
3. Attend state and national conferences.
4. Conduct regional high school visitations.
5. Offer summer courses at USF.

6. Identify and implement USF minority scholarship programs designed to improve and sustain student diversity, such as the USF Latino Scholarship Program.

Neither FAMU nor FIU offer an undergraduate program in Cell and Molecular Biology in CIP Code 26.0406.

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.)

Please see details presented in Table 2-A.

As presented in Table 4-A, 14 CMMB faculty members will be teaching in the CAM degree. The salary of the existing members, in congruence with their teaching commitment, will be reallocated from the existing CAM major under the general biology CIP 26.0101 to the new CAM degree program under the new CIP 26.0406 (Table 3-A). Faculty salary and benefits are estimated at \$627,567 for year one (Table 2-A). In addition, in year one we will reallocate one teaching lab manager (A&P) and one support staff member (USPS), with salary and benefits for the Lab Manager at \$29,767 (55% effort), and \$8,099 (20% effort) for the support staff in year one. Finally, \$5,000 will be allocated for instructional supply expenses, and \$810,000 for graduate assistantships (TAs) for the teaching of CAM program undergraduate laboratory courses (Table 2-A). These laboratory courses include: BSC 2010L (Cellular Processes), PCB 3063L (Genetics), PCB 3023L (Cell Biology), PCB 4024L (Molecular Biology of the Cell), and PCB 4026L (Molecular Biology of the Gene).

Five year estimates are based on a flat 2% increase in salary rates per year (Table 2-A). Faculty salary and benefits are estimated at \$679,298, A&P at \$32,220 and USPS at \$8,767 for year five. In addition, assistantships are estimated at \$876,769. Expenses will remain at \$5,000 in year five.

- 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.

There is no plan to operate the CAM program through continuing education or intentions to seek approval for market tuition rate.

- 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).

The current CAM major under CIP Code 26.0101 was created in fall of 2012, and was previously housed under the General Biology degree (CIP Code 26.0101) as a concentration. This major in CAM awarded 76 degrees during the 2015-2016 academic year with an enrollment of 737. For the 2018-2019 academic year, there were 138 graduating students and 795 students enrolled. The current major offers robust opportunities for undergraduate research and cutting edge laboratory experiences within the curriculum, which will continue under the new degree program.

Since the major has been in existence since 2012, there have been students who switch into and out of the major but we do not expect an increase shift in the students switching into the new degree program.

Therefore, we do not expect that this proposed new degree program in Cell and Molecular Biology will impact other programs by the conversion to its own degree.

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 is no increased need for general education or other prerequisite courses for this new degree program. The current general education courses and prerequisite courses that support the current major will now support the major in the new degree program.

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 financing of this new undergraduate program, as described above in Section III.A. and in the appendix, is from E&G base budget (reallocated from the current major, which will be discontinued). External fundraising from philanthropists and/or the industrial section is not required to make this new undergraduate program successful.

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.

Projected qualitative benefits of the B.S. in Cell and Molecular Biology to USF: The University of South Florida benefits from having the State’s first undergraduate degree in Cell and Molecular Biology as it will draw students from around the state, the nation and internationally who are interested in obtaining this specialized degree in the dynamic area of cell and molecular biology. Because of its specialization, the new CAM degree will make USF more competitive within the rapidly changing field of biology and importantly will better prepare students for a myriad of career opportunities emphasizing focused skill sets in cell and molecular biology. Graduates will be highly competitive for matriculation to professional schools in the many health related fields, graduate school in the sciences and for jobs in private health related industries and, local, state and national government agencies. More and better-prepared USF graduates like those from this new degree program will continue to enhance USF’s Performance Based Funding metrics and state and national reputation.

Projected quantitative benefits of the B.S. in Cell and Molecular Biology to USF: Given the interest in the current major under the general biology CIP it is expected that this new degree will attract many more

students over the next five years. This will lead to more degrees awarded in state designated strategic areas of emphasis (over 300 based on growth in student demand expected for the program) (see Table 1-A).

Projected qualitative benefits of the B.S. in Cell and Molecular Biology to the community: The local Tampa Bay area benefits from having students equipped with an undergraduate degree in Cell and Molecular Biology to fill critical needs in the biomedical science areas. The further development of the I-4 Technology Corridor in our vicinity depends on a steady flow of graduates with the significant skills developed in modern degree programs in science and engineering, such as the Cell and Molecular Biology program.

Projected quantitative benefits of the B.S. in Cell and Molecular Biology to the community: According to the Florida High Technology Corridor web site (url: <https://floridahightech.com/>; visited 10/11/19), the I-4 Technology Corridor is composed of more than 740 companies with over 14,800 employees in the area of Life Sciences and Medical Technologies. Graduates from the Cell and Molecular Biology program will be perfectly equipped to help fill this workforce need.

Projected qualitative benefits of the B.S. in Cell and Molecular Biology to Florida: This new degree supports the current State University System (SUS) Strategic Goals to: (1) "Enhance opportunities for all students by providing transformative learning—including increased commitment to STEM and health fields"; (2) Engage in high-impact research, scholarship and creative activities that generate new knowledge; and (3) Establish mutually beneficial partnerships that enhance student access to academic programs, research and employment opportunities.

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 is not applicable since the number of credit hours for this degree is 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.

The program prerequisites are the same as the approved common prerequisites for the General Biology programs (CIP Code 26.0101 Track 1/4) within the State University System.

Unless stated otherwise, a grade of C- is the minimum acceptable grade in the following prerequisite courses:

USF Course	Common Prerequisite Course
BSC 2010 Cellular Processes (3) BSC 2010L Cellular Processes Laboratory (1)	BSC X010/X010L or BSC X010C or BSC X040C
BSC 2011 Biodiversity (3) BSC 2011L Biodiversity Laboratory (1)	BSC X011/X011L or BSC X011C or ZOO X010/010L or BOT X010/X010L or BSC X041C or ZOO X010C or BOT X010C
CHM 2045 General Chemistry I (3) CHM 2045L General Chemistry I Laboratory	CHM X045/X045L or CHM X045C or [CHM X040 and CHM X041]
CHM 2046 General Chemistry II (3) CHM 2046L General Chemistry II	CHM X046/X046L or CHM X046C
[(CHM 2210 Organic Chemistry I (3) and CHM 2210L Organic Chemistry I Laboratory (2)) and (CHM 2211 Organic Chemistry II (3) and CHM 2211L Organic Chemistry II Laboratory (2))] or [(PHY 2048 General Physics I - Calculus Based (3) and PHY 2048 General Physics I - Calculus Based Laboratory (1)) and (PHY 2049 General Physics I - Calculus Based (3) and PHY 2049 General Physics I - Calculus Based Laboratory (1))] or [(PHY 2053 General Physics I (3) and PHY 2053 General Physics I Laboratory (1)) and (PHY 2054 General Physics I (3) and PHY 2054 General Physics I Laboratory (1))]	(CHM X210/X210L and CHM X211/X211L) or (CHM X210C and CHM X211C) or (PHY X053/X053L and PHY X054/X054L) or (PHY X048/X048L and PHY X049/X049L)
MAC 2311 Calculus I (4) and MAC 2312 Calculus II (4)	MAC X311 or MAC X233 or MAC X253 or MAC X281 or MAC X241 MAC X312 or MAC X282 or MAC X234 or STA X023 or STA X024 or STA X321

- 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.

This is not applicable since we do not intend to seek formal Limited Access status for the proposed degree 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 approved 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](#)).**

This proposed program is a STEM program that is central to the USF and BOG strategic plan. This undergraduate program will prepare students for health related professional schools, graduate school, and careers in biotechnology, secondary level teaching, research, industry, and government agencies. As a STEM program, this degree will be in high demand and therefore continue to grow as supported by data from the U.S. Bureau of Labor Statistics (see section II).

- 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.**

In 2006, the original Biology department was reorganized into two semi-autonomous academic units that, in 2009, ultimately became two independent departments: Cell Biology, Microbiology, and Molecular (CMMB) and Integrative Biology (IB). From its inception and by design, CMMB has a focus on biomedical research and education. CMMB collaborates with other biomedical units on the USF campus including Chemistry, Physics, and Engineering. In addition, CMMB faculty collaboration with USF Health's College of Medicine and its Department of Molecular Medicine, Moffitt Cancer Center, amongst other departments on campus. The mission of CMMB is to prepare students for professional careers in the areas of Cell Biology and Molecular Biology as well as in Microbiology. CMMB pursues excellence in the following programmatic research areas through strategic hires, grant acquisitions, and scholarly publications: (1) Genome Integrity and Mechanisms of Aging, (2) Bacterial Pathogenesis and Resistance, (3) Structural and Computational Biology, (4) Lipid Signaling/Lipidomics, and (5) STEM Education. CMMB serves the University, scientific, and greater community by providing intellectual resources and engaging in scholarly activities that are consistent with our education and research missions.

CMMB has a responsibility for the education of undergraduate and graduate students in core cell biology, molecular biology, genetics, and microbiology topics as well as more specialized areas that require detailed knowledge of these subjects. To accomplish this mission, CMMB offers curricula that will lead to the proposed degree in Cell and Molecular Biology, as well as graduate degrees in Biology and Microbiology (M.S.) as well as the Doctor of Philosophy degree in Cell and Molecular Biology (presently housed under the same CIP code: 26.0406). We also have a joint program with the Ph.D. in Cancer Biology. Courses are designed to also meet the needs of students majoring in other science disciplines, as well as non-science areas.

The faculty and students of CMMB pursue scientific knowledge through rigorous research programs both within the department and in collaboration with other departments and universities. The knowledge gained through these programs is disseminated through professional mechanisms of communication as well as through classroom activities. CMMB faculty view the research activities as integrated with its teaching mission so that students fully understand the topical goals and methodologies within cell biology, molecular biology, genetics, microbiology, and other specialized areas within these disciplines.

CMMB's mission is directly related to the College's emphasis to educate students in STEM fields and to carry out original biomedical related research following SUS goals: "Student access, learning, and success through a vibrant, interdisciplinary, and learner-centered research environment incorporating a global curriculum". This is needed to support student's development of knowledge, skills, and aptitudes for success in the global society and marketplace.

- 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 CMMB department has a focus on biomedical research and education. In summer of 2006, Dr. James Garey was Co-Chair of the Biology Department and Director of the CMMB Division and in January 2009, became Chair of the new CMMB Department. Dr. Garey’s term ended in August 2017, at which time Dr. Charles Chalfant became the new Chair of the CMMB department. CMMB has offered the B.S. in Biology with a major in Cell and Molecular Biology since fall 2013. This major is presently under the CIP 26.0101 code. Due to consolidation of SACSCOC accreditation, which resulted in review of degree programs on more than one of USF’s campuses, we were given permission and support to seek a new CIP code for a separate Cell and Molecular Biology degree under CIP 26.0406.

Planning Process

Date	Participants	Planning Activity
March 2019	CMMB Undergraduate (Faculty) Committee	Facilitate consolidation of the Biology program across the USF campuses. The goal was to obtain new CIP code for Cell and Molecular Biology, which is currently a major under CIP 26.0101. The Undergraduate Committee met and assisted in developing the proposal.
April 9, 2019	Meera Nanjundan, Faculty Member	Submitted pre-proposal for CAM degree under CIP 26.0406.
April 23, 2019	CAVP Academic Program Coordination Work Group	The CMB pre-proposal was reviewed by the CAVP Academic Program Coordination review group who expressed no concerns
April 23, 2019	Meera Nanjundan and James Riordan, College leadership and Office of Decision Support	Began working on the CMB new degree proposal.
May 14, 2019	Board of Trustee’s Academics and Campus Environment	Approved the Accountability Plan
June 6, 2019	Board of Trustees	Approved the Accountability Plan
June 11, 2019	Board of Governors	Approved the Accountability Plan

Events Leading to Implementation

Date	Implementation Activity
August, 2019	CAS approved the new degree proposal
September 23, 2019	USF’s Undergraduate Council approved the new degree proposal
October 17, 2019	USF’s Academic Program Advisory Council approved new degree proposal
November 20, 2019	BOT ACE Committee approved new degree proposal
December 3, 2019	BOT approved the new degree proposal.
December, 2019	Proposal sent to the BOG staff for review and addition to the Academic Program Inventory

January-July 2020	Once approved, we will add it to the USF catalog, Student Information System, website and market the program and recruit students
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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 most recent external review of CMMB programs occurred in the fall of 2013. The review of the CAM undergraduate program is planned subsequent to university consolidation. CMMB graduate programs, as well as the undergraduate Microbiology program are slated for review this year (2019).

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.

Please see Appendix D for the Academic Learning Compact.

Following are the proposed student learning outcomes for the program:

Goal 1: Discipline Specific Knowledge and Skills

Learning Outcome #1

Students will develop a thorough understanding of (a) protein trafficking, (b) signal transduction, (c) cell cycle/division and cell death pathways.

Learning Outcome #2

Students will demonstrate competency in modern laboratory skills in two of the following: (a) pipetting, (b) gel loading, or (c) protein quantification (standard curve).

Goal 2: Critical Thinking

Learning Outcome #1

Students will demonstrate their critical thinking skills in cell and molecular biology by critically analyzing experimental data and interpreting results; these competencies will be demonstrated in a written laboratory report.

Goal 3: Communication Skills

Learning Outcome #1

Students will demonstrate their ability to communicate in written works on molecular aspects of the gene including (a) sequence, structure, function of DNA, RNA, and protein, (b) chromosome structure and its importance in packaging and replication, and (c) the mechanisms involved in DNA replication, transcription, translation, and gene regulation.

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

Students applying to the University of South Florida are expected to meet the University's admissions standards, as listed on USF's Office of Admissions' website (<https://www.usf.edu/admissions/>). (URL

added 9/2/2019)

For graduation, students must satisfy the requirements from their catalog year while maintaining GPA and grading requirements, and satisfactory completion of the following requirements:

- General Education Program (36 credit hours), including State Core General Education, State Computation and Communication;
- Minimum of 120 unduplicated credit hours;
- A minimum adjusted grade point average (GPA) of 2.0 on all coursework taken at USF and an overall 2.0 GPA average on all college-level coursework;
- Major and college requirements in a chosen degree program;
- Nine credit hours of coursework taken during the summer term(s) (if entered USF with less than 60 credit hours);
- Registration and successful completion of at least thirty (30) of the last sixty (60) credit hours;
- 42 credit hours of upper-level coursework;
- Civics Literacy;
- Foreign language admissions coursework;
- Specific Grading Requirement: Unless otherwise stated, the minimum acceptable grade in all BSIS required courses, including the prerequisite math, statistics, and programming courses, is a C or higher (C- is insufficient).
- Each College of Arts and Sciences student is required to complete an application for graduation and graduation checklist.

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 Supporting Courses for the Major (8-10 Credit Hours)

The following courses are supporting courses for this major. They are required for the major, but are not counted in the total major hours but are counted toward the total program hours of 120 credit hours. The degree will not be awarded if these courses have not been taken by the end of the student's final semester.

1. [(CHM 2210 Organic Chemistry I (3) and CHM 2210L Organic Chemistry I Laboratory (2)) and (CHM 2211 Organic Chemistry II (3) and CHM 2211L Organic Chemistry II Laboratory (2))]
or
2. [(PHY 2048 General Physics I – Calculus Based (3) and PHY 2048 General Physics I – Calculus Based Laboratory (1)) and (PHY 2049 General Physics I - Calculus Based (3) and PHY 2049 General Physics I – Calculus Based Laboratory (1))]
or
3. [(PHY 2053 General Physics I (3) and PHY 2053 General Physics I Laboratory (1)) and (PHY 2054 General Physics I (3) and PHY 2054 General Physics I Laboratory (1))]

Note: The course sequence that will count toward the Support Courses requirement is based on which sequence (Organic Chemistry or Physics) the student took to meet the common prerequisite requirement. If the Organic Chemistry sequence was taken to fulfill the common prerequisite requirement, the Physics sequence will meet the supporting courses requirement. The opposite is true if the Physics requirement was used to meet the common course requirement.

Total major credit hours: 32

Major Core: 17 credit hours:

MCB 3410 Cell Metabolism (3)

PCB 3063 General Genetics (3)
 PCB 3063L General Genetics Laboratory (1) PCB 3023 Cell Biology (3)
 PCB 3023L Cell Biology Laboratory (1)

Students choose two course from the following list of courses: PCB 4024 Molecular Biology of the Cell (3)
 PCB 4026 Molecular Biology of the Gene (3) PCB 4109 Cancer Biology (3)

Major (Restrictive) Electives: 15 credit hours:

Students choose a minimum of 15 credit hours of electives from the following list of courses: BCH 3053 General Biochemistry (3)
 BOT 4434C Mycology (3) BSC 4434 Bioinformatics (3)
 BSC 4905 Independent Study (1-3)
 BSC 4910 Undergraduate Research (1-4) BSC 4933 Selected Topics in Biology (1-4)*
 BSC 5425 Genetic Engineering and Recombinant DNA Technology (3) BSC 5931 Selected Topics in Biology (1-4)
 MCB 3020 General Microbiology (3)
 MCB 3020L General Microbiology Laboratory (1) MCB 4503 Virology (3)
 PCB 3043 Principles of Ecology (3)
 PCB 3043L Principles of Ecology Laboratory (1) PCB 3712 General Physiology (3)
 PCB 3713L General Physiology Laboratory (1) PCB 4024 Molecular Biology of the Cell (3) PCB 4026 Molecular Biology of the Gene (3) PCB 4109 Cancer Biology (3)
 PCB 4234 Principles of Immunology (3)
 PCB 4522C Experimental Genetics and Cell Biology (3) PCB 4663 Human Genetics (3)
 PCB 4671 Molecular Evolution (3)
 PCB 4744 Biomedical Physiology (3)
 PCB 4843 Principles of Neuroscience (3)
 ZOO 4753 Human Histology & Molecular Pathology of Disease (3) ZOO 4694 Developmental Biology (3)

*Selected Topics courses require advanced approval from the Undergraduate Program Director or Advisor.

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

Please see Appendix E for the eight-semester and four-semester sequenced plans of study.

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

CHM 2210 Organic Chemistry I (3): Fundamental principles of organic chemistry.

CHM 2210L Organic Chemistry I Laboratory (2): Laboratory portion of Organic Chemistry I. Introduction of organic laboratory principles and techniques.

CHM 2211 Organic Chemistry II (3): Continuation of organic chemistry.

CHM 2211L Organic Chemistry II Laboratory (2): Continuation of organic chemistry laboratory.

PHY 2048 General Physics I – Calculus Based (3): First semester of a two-semester sequence of calculus-based General Physics which includes a study of mechanics, wave motion, sound, thermodynamics, geometrical and physical optics, electricity and magnetism for students majoring in Physics, Chemistry and Engineering.

PHY 2048 General Physics I – Calculus Based Laboratory (1): First semester of a two-semester sequence of general physics (mechanics, wave motion, sound, thermodynamics, geometrical and physical optics, electricity, and magnetism) and laboratory for physics majors and engineering students.

PHY 2049 General Physics I - Calculus Based (3): Second semester of calculus based general physics. Topics studied include wave mechanics, electricity and magnetism, and optics.

PHY 2049 General Physics I – Calculus Based Laboratory (1): Second semester of general physics and laboratory for physics majors and engineering students.

PHY 2053 General Physics I (3): First semester of a two semester sequence of non-calculus-based general physics (mechanics, heat, wave motion, sound, electricity, magnetism, optics, modern physics) for science students.

PHY 2053 General Physics I Laboratory (1): First semester of a two semester sequence of general physics (mechanics, heat, wave motion, sound, electricity, magnetism, optics, modern physics) laboratory for science students.

PHY 2054 General Physics I (3): Second semester of non-calculus based general physics. Topics studied include electricity and magnetism, optics and modern physics.

PHY 2054 General Physics I Laboratory (1): Second semester of general physics lab for science students.

MCB 3410 Cell Metabolism (3): This course will provide a broad framework and overview of major metabolic pathways that occur in living cells with emphasis on integration and regulation of those pathways.

PCB 3063 General Genetics (3): Introduction to genetics including the fundamental concepts of Mendelian, molecular and population genetics. Lecture only.

PCB 3063L General Genetics Laboratory (1): Laboratory investigation techniques in general genetics including Mendelian and non-Mendelian relationships, and gene interactions.

PCB 3023 Cell Biology (3): Cell Biology is the study of living properties of cells and encompasses a broad area of the life sciences that includes cellular physiology and life cycle, organelle structure and function, and bimolecular structure and function.

PCB 3023L Cell Biology Laboratory (1): Laboratory portion of Cell Biology. Metabolic processes within the cell.

PCB 4024 Molecular Biology of the Cell (3): This lecture-based course will focus on advanced principles of molecular cell biology with emphasis on protein structure and function in key cellular pathways.

PCB 4026 Molecular Biology of the Gene (3): This lecture-based course will provide fundamental knowledge of scientific concepts and principles of the molecular aspects of DNA metabolism in pro- and eukaryotes.

PCB 4109 Cancer Biology (3): This course will provide a background in basic cancer biology, including genetics, cellular physiology and metabolism associated with cancer development. Aspects of drug therapy and discovery will be considered.

BCH 3053 General Biochemistry (3): This course is a one-semester, introductory course in Biochemistry. This course is open to all majors and strongly recommended for Biomedical Science majors.

BOT 4434C Mycology (3): A survey of the fungi with emphasis on their taxonomy, morphology, physiology and economic importance.

BSC 4434 Bioinformatics (3): This lecture-based, nonrestrictive course covers basics of molecular bioscience data management/analysis. Focus is on general computational methods, their bio-basis, and how to evaluate analysis results. Qualitative algorithm descriptions are included.

BSC 4905 Independent Study (1-3): Specialized independent study determined by the student's needs and interests. The written contract required by the Department of Biology specifies the regulations governing independent study.

BSC 4910 Undergraduate Research (1-4): Junior standing and 3.0 GPA required. Individual investigation with faculty supervision. Written contract by Department is necessary prior to registration.

BSC 4933 Selected Topics in Biology (1-4)*: The course content will depend on student demand and instructor's interest.

BSC 5425 Genetic Engineering and Recombinant DNA Technology (3): This lecture-based course will use a problem solving approach, provide fundamental knowledge of scientific concepts and principles that form the basis of experimental methodologies in genetic engineering and recombinant DNA technology.

BSC 5931 Selected Topics in Biology (1-4): The course content will depend on student demand and instructor's interest.

MCB 3020 General Microbiology (3): Structure and function of bacteria, archaea, viruses, and eukaryotic microbes.

MCB 3020L General Microbiology Laboratory (1): The laboratory involves preparation of culture media, staining, pure culture methodology, isolation of microbes from nature, enumeration techniques, resistance to infectious disease.

MCB 4503 Virology (3): The biology of viruses associated with plants, animals, and bacteria will be considered; the nature of viruses, mechanisms of viral pathogenesis, and interactions with host cells.

PCB 3043 Principles of Ecology (3): An introduction to the basic principles and concepts of ecology at the ecosystem, community, and population level of organization.

PCB 3043L Principles of Ecology Laboratory (1): Laboratory portion of PCB 3043, Principles of Ecology.

PCB 3712 General Physiology (3): Comparative analysis of animal structure and function: organ systems and activities of body tissue and organs. Functional responses of plants to both internal and environmental signals lecture only.

PCB 3713L General Physiology Laboratory (1): Laboratory portion of General Physiology.

PCB 4024 Molecular Biology of the Cell (3): PR: PCB 3023, PCB 3063, MCB 3410 This lecture-based course will focus on advanced principles of molecular cell biology with emphasis on protein structure and function in key cellular pathways.

PCB 4026 Molecular Biology of the Gene (3): This lecture-based course will provide fundamental knowledge of scientific concepts and principles of the molecular aspects of DNA metabolism in pro- and eukaryotes.

PCB 4109 Cancer Biology (3): This course will provide a background in basic cancer biology, including genetics, cellular physiology and metabolism associated with cancer development. Aspects of drug therapy and discovery will be considered.

PCB 4234 Principles of Immunology (3): Emphasis is on organization and functions of vertebrate immune system. Basic cellular and molecular mechanisms of immune responses in health and disease are addressed as well as the principles and applications of immunological methods.

PCB 4522C Experimental Genetics and Cell Biology (3): This course will teach students how to utilize and integrate concepts from genetics and cell biology in a research laboratory environment using current scientific literature, model organisms and molecular techniques.

PCB 4663 Human Genetics (3): A lecture-based course building upon principles introduced in Cell Biology and Genetics to explore advanced topics applied to human heredity and inherited disorders. Instruction includes problem solving, group activities, internet and individual projects.

PCB 4671 Molecular Evolution (3): The study of evolution at the molecular level and how it is applied to cell and molecular biology.

PCB 4744 Biomedical Physiology (3): Detailed examination of mammalian physiology focusing on the cellular and molecular mechanisms that underlie and regulate physiological function.

PCB 4843 Principles of Neuroscience (3): Study of the mammalian brain's structure and function, with an emphasis on human neuroanatomy, neuropharmacology, and neurophysiology. Topics include brain imaging, dementia, mechanisms of learning/memory, and neuropathological processes.

ZOO 4753 Human Histology & Molecular Pathology of Disease (3): The study of cellular and molecular mechanisms underlying various disease states of the human body present in the context of traditional pathology.

ZOO 4694 Developmental Biology (3): This course will use a problem solving approach to provide fundamental knowledge of scientific concepts and paradigms involved in the mechanisms underlying patterns of embryonic development.

- 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.**

CMMB faculty have designed a curriculum aimed at sufficiently covering areas of knowledge relevant to existing technologies and industries in the field of cell and molecular biology. This has included (I) identifying trends in the workforce and in education, and (II) through discussions with industry leaders at annual conferences in the field. CMMB faculty perform routine assessments of the curriculum in break-out sessions during annual retreats to assure content continues to be relevant.

- 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.**

There is no special accreditation by professional agencies in cell and molecular biology.

- 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 CAM degree will be traditionally delivered on campus as a face-to-face method. However, sections of the following courses are offered online: BSC 2010, PCB 3023, and PCB 3063.

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 details presented in Table 4 in Appendix A.

Full-time faculty who will teach in the CAM program, as found in Appendix A, Table 4:

• Richard Pollenz, Ph.D.	Professor, Molecular and Cellular Biology
• Kristina Schmidt, Ph.D.	Professor, Molecular and Cellular Biology
• Gary Daughdrill, Ph.D.	Associate Professor, Molecular and Cellular Biology
• Meera Nanjundan, Ph.D.	Associate Professor, Molecular and Cellular Biology
• Brant Burkhardt, Ph.D.	Associate Professor, Molecular and Cellular Biology
• Younghoon Kee, Ph.D.	Associate Professor, Molecular and Cellular Biology
• Sandra Westerheide, Ph.D.	Associate Professor, Molecular and Cellular Biology
• Sameer Varma, Ph.D.	Associate Professor, Molecular and Cellular Biology
• Margaret Park, Ph.D.	Assistant Professor, Molecular and Cellular Biology
• Huzefa Dungalwala, Ph.D.	Assistant Professor, Molecular and Cellular Biology
• Libin Ye, Ph.D.	Assistant Professor, Molecular and Cellular Biology
• Johnny El-Rady, Ph.D.	Instructor III, Molecular and Cellular Biology
• Ashok Upadhyaya, Ph.D.	Instructor II, Molecular and Cellular Biology
• Beth Jones-Mason, Ph.D.	Instructor II, Molecular and Cellular Biology

- 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.

Please see details presented in **Table 2-A**.

There will be a total of 14 CMMB faculty assigned to teaching responsibilities in the CAM program. Total cost for faculty salaries is \$627,567 in year one and \$679,298 in year five. The increase between year one and five is due to estimated salary increases.

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

Please see Appendices for the abbreviated curriculum vitae for the existing faculty.

- 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.**

In the past 5 years, thirteen CMMB faculty have received promotions, including two faculty to Full Professor, six to Associate Professor, one to Level III Instructor, three to Level II Instructor. In addition, the Department has acquired five new faculty members, including three Assistant Professors and two Level I Instructors.

CMMB faculty teach to large numbers of students and generate an enormous amount of student credit hours (SCH) per academic year (AY) (Figure 1). In AY 2014-2015, total SCH for CMMB was 32,440 and has steadily increased over the past 5 years by 250 SCH per year to an estimated 33,865 for the current AY.

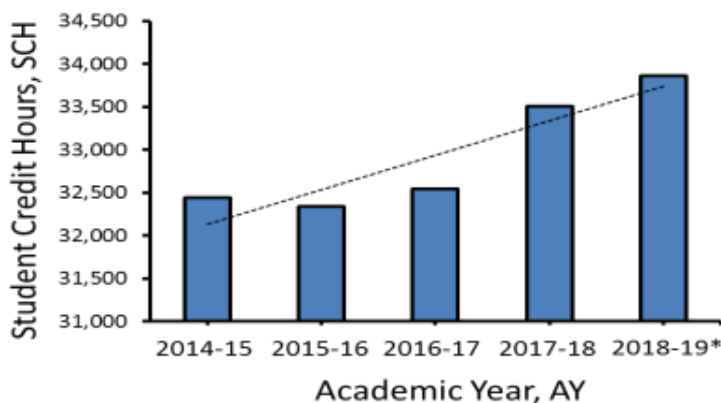


Figure 1-A: Total undergraduate student credit hours (SCH) for the department of CMMB.

*The SCH for AY 2018-19 is estimated.

Teaching is of paramount importance to members of the CMMB department. Several CAM faculty have received awards for teaching excellence in the CAM major over the past five years. Dr. El-Rady (Instructor III) has received the STEM Institutional Scholars Teaching Award in 2016, and received the USF Kosove Society Distinguished Teaching and Service Award in 2018. Dr. Jones-Mason (Instructor II) has received the STEER-STEM Scholars Teaching Award in 2017 and the Outstanding Undergraduate Teaching Award in 2018. Dr. Nanjundan (Associate Professor) received a Fulbright Scholarship in 2019.

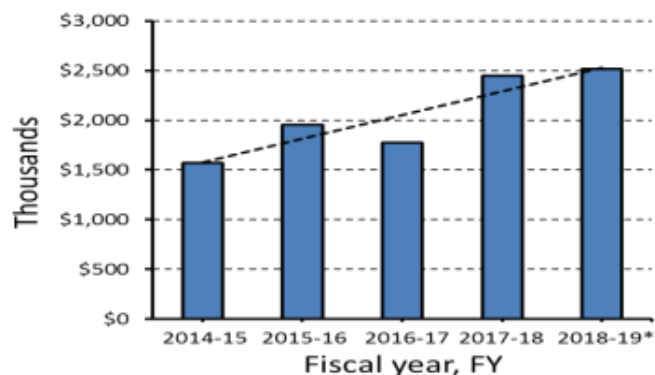


Figure 2-A: Total research expenditures in the department of CMMB.
*The expenditures for FY 2018-19 is estimated

The CMMB department has a robust and nationally recognized research program in cellular biology, molecular biology and microbiology. There are a total of 32 current funding awards to CAM faculty in CMMB from National Institutes of Health and the National Science Foundation, and private/local agencies. The continued growth in externally-funded research over time is apparent from annual research expenditures (Figure 2). Expenditures in fiscal year (FY) 2014-2015 exceeded \$1,500,000 and have increased over the past 5 years by \$190,000 per year to an estimated \$2,518,000 for FY 2018-2019.

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.

Part I – Overview of USF Libraries, Mission, and Program/Discipline Strengths

The University of South Florida (USF) is accredited by the Southern Association of Colleges and Schools' Commission on Colleges (SACSCOC) to award associate, baccalaureate, master's, specialist, doctorate and professional degrees. 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 and the Hinks and Elaine Shimberg Health Sciences Library, both located on the Tampa Campus; the Nelson Poynter Memorial Library, USF St. Petersburg campus; and an Information Commons at the USF Sarasota-Manatee campus. Access to print resources at the USF Tampa Library is available 24/5, and access to electronic resources is available remotely 24/7.

The USF Libraries inspire research, creativity, and learning by connecting the USF community to relevant and high-quality information. Our vision is to become the center of a highly engaged university community, driven to produce high-impact research and to nourish creativity. Together, the USF Libraries provide access to more than 2 million volumes and an extensive collection of electronic resources including approximately 64,928 e-journal subscriptions and over 900 aggregator databases containing another 92,855 unique e-journal titles, 693,313 e-books, and 826,000 digital images. In addition, students have access to over 83,000 audio/visual materials including electronic media, music scores, audiobooks, CDs, and DVDs.

The USF Libraries endeavor to develop and maintain a research collection that satisfies the resource needs

of the undergraduate and graduate curriculums in College of Arts and Science Department of Integrative Biology and also meets the specialized needs of the students and faculty for a Bachelor of Science program in Cell and Molecular Biology.

Part II - USF Libraries' Collections MONOGRAPHS (Print and Ebooks)

The USF Libraries contain extensive holdings of books in both print and e-book format that support student and faculty instructional and research needs in the new program. To identify the scope of relevant books, titles were derived from searching the library's catalog by Library of Congress Subject Headings relevant to Cell and Molecular Biology studies.

MONOGRAPHIC COUNTS			
Library of Congress Subject Headings for Cell and Molecular Biology			
Library of Congress (LC)	Subject Heading	Print	Number of E-books
QH	Natural History	4,955	6,407
QH 366- 442	Genetics &	153	472
QH 450	Developmental	179	302
QH 450	Molecular Biology	701	933
QH 573 -671	Cytology	446	1,308
QH 581-671	Cells	1,735	2,871
QD 431-QP	Proteins	808	1,260
QP 514	Biochemistry	779	3,176
QR	Microbiology	901	1,801
Total E-Books		10,657	18,530

Total Number of Monographs

- Print = 10,657
- Electronic = 18,530

Ebooks and Ebook Collections

- Cambridge Core Ebooks
- EBSCO Ebook Collection
- Oxford Scholarship Online and University Press Scholarship Online
- ProQuest Ebook Central
- ScienceDirect
- SpringerNature eBooks including Collection in Biomedicine & LifeSciences
- Taylor & Francis and CRCNetBase eBooks
- Wiley Online Library

MAJOR SERIAL TITLES (JOURNALS)

The USF Libraries subscribe to several scholarly and professional journals that have an editorial scope and content which support curricular activities at the Bachelor of Science level. A majority of the titles are in electronic format thereby enhancing accessibility. Journal titles were derived by searching Scopus SciMago and Web of Science JCR ranked journals for curriculum topics in Cell and Molecular Biology. Serial Title Subscriptions and Access

- 105 Journal Titles (electronic format)

Major Serial Titles			
Journal Title	SJR Index	H Index	USF Library Holdings
Cell	JCR 242.82	705	ScienceDirect - Cell Press 01/01/1995 - present
Nature Medicine	JCR 79.243	257	Nature Journals Online 01/01/1995 - present
Nature Reviews Genetics	30.428	320	Nature Journals Online 01/01/2000 - present
Nature Reviews Microbiology	30.397	386	Nature Journals Online 01/01/2003 - present
Nature Reviews Molecular Cell Biology	30.397	386	Nature Journals Online 01/01/2000 - present
Nature Methods	21.178	257	Gale OneFile: Health and Medicine 10/01/2004 - present
Nature Chemical Biology	12.137	337	Nature Journals Online Most recent 2 years available.
Molecular Cell	12.076	356	ScienceDirect - Cell Press 01/01/1997 - present
Physiological Reviews	11.797	312	HighWire Press 01/01/1921 - present
Cancer Cell	11.741	295	ScienceDirect - Cell Press 01/01/2002 - present
Annual Review of Plant Biology	11.591	235	Annual Reviews 01/01/2002 - present
Cell Stem Cell	11.434	212	ScienceDirect Open Access Titles 06/07/2007 - present
Cell Metabolism	10.692	219	ScienceDirect Open Access Titles 01/01/2005 - present
Annual Review of Cell and Developmental Biology	10.329	204	Annual Reviews 01/01/1995 - present
Trends in Cell Biology	10.011	215	ScienceDirect Freedom Collection 01/01/1995 - present
Nature Structural and Molecular Biology	10.005	249	Nature Journals Online 01/01/2004 - present
Genome Biology	9.867	207	PubMed Central (PMC) 01/01/2000 - present
Annual Review of Biophysics	9.430	146	EBSCO Open Access Biology Collection 01/01/1997 - present

Major Serial Titles			
Journal Title	SJR Index	H Index	USF Library Holdings
Trends in Biochemical Sciences	8.695	253	ScienceDirect Freedom Collection 01/01/1995 - present
Cell Host and Microbe	7.822	147	ScienceDirect Open Access Titles 03/15/2007 - present
EMBO Journal	7.579	368	PubMed Central (PMC) 01/01/1982 - present
Microbiology and Molecular Biology Reviews	7.278	229	HighWire Press 01/01/1937 - present
Molecular Biology and Evolution	7.124	197	Oxford University Press 01/01/1996 - present
Molecular Biology of the Cell	7.124	197	PubMed Central (PMC) 01/01/1992 - present
Current Opinion in Cell Biology	6.658	242	ScienceDirect Freedom Collection 01/01/1995 - present
Current Opinion in Structural Biology	6.658	242	ScienceDirect Freedom Collection 02/01/1995 - present
PLoS Genetics	6.626	197	PLoS - Public Library of Science 01/01/2005 - present
Cell Systems	6,370	30	ScienceDirect 07/29/2015 - present
Journal of Extracellular Vesicles	6,283	47	Taylor & Francis Open 01/01/2012 - present
Blood	6,065	426	HighWire Press 01/01/1946 - present
Developmental Cell	5.638	239	ScienceDirect - Cell Press 07/01/2001 - present
Plant Cell	5.624	309	PubMed Central (PMC) 01/01/1989 - present
Annual Review of Genomics and Human Genetics	5.315	104	Annual Reviews 01/01/2000 - present
Genome Medicine	5.084	66	PubMed Central (PMC) 01/01/2009 - present
Bioinformatics	4.549	335	Oxford University Press 01/01/1996 - present
EMBO Reports	4.459	164	Wiley Online Library 01/01/2000 - present
Mobile DNA	4.407	27	BioMed Central 01/01/2010 - present

Major Serial Titles			
Journal Title	SJR Index	H Index	USF Library Holdings
Molecular Plant	4.269	85	ScienceDirect Freedom Collection 01/01/2008 - present
Development (Cambridge)	4.184	302	HighWire Press 01/01/1953 - present
Autophagy	4.168	121	Taylor & Francis Science & Technology Library 01/01/2005 - present
Ageing Research Reviews	4.125	98	ScienceDirect Freedom Collection 02/01/2002 - present
Wiley Interdisciplinary Reviews: RNA	4.075	56	Wiley Online Library 01/01/2010 - present
PLoS Computational Biology	4.001	194	PLoS - Public Library of Science 01/01/2005 - present
Cell Death and Differentiation	3.980	193	PubMed Central (PMC) 01/01/2011 - present
Cell Death and Disease	3.980	193	PubMed Central (PMC) 01/01/2010 - present
PLoS Pathogens	3.909	174	PLoS - Public Library of Science 01/01/2005 - present
Aging Cell	3.809	121	PubMed Central (PMC) 01/01/2011 - present
Critical Reviews in Biochemistry and Molecular Biology	3.703	97	Taylor & Francis Science & Technology Library 01/01/1997 - present
Stem Cell Reports	3.698	55	PubMed Central (PMC) 01/01/2013 - present
BMC Biology	3.628	90	PubMed Central (PMC) 01/01/2003 - present
Wiley Interdisciplinary Reviews: Developmental Biology	3.620	34	Wiley Online Library 01/01/2012- present
Genomics Proteomics and Bioinformatics	3.599	35	PubMed Central (PMC) 01/01/2003 - present
Journal of Molecular Biology	3.578	251	ScienceDirect 01/01/1993 - present
Plant Journal	3.376	241	Wiley Online Library 01/01/1997
Neurobiology of Stress	3.359	23	PubMed Central (PMC) 01/01/2015 - present
Molecular Metabolism	3.343	43	PubMed Central (PMC) 01/01/2012 - present
Molecular Therapy	3.288	158	PubMed Central (PMC) 01/01/2009 - present

Major Serial Titles			
Journal Title	SJR Index	H Index	USF Library Holdings
Molecular Cancer	3.270	103	SpringerOpen 01/01/2002 - present
Science signaling	3.169	134	HighWire Press 01/01/1999 - present
Seminars in Cell and Developmental Biology	3.139	128	ScienceDirect Freedom Collection 02/01/1996 - present
Oncogene	3.127	312	Nature Journals Online 01/01/2013 - present
Human Molecular Genetics	3.097	255	Oxford University Press 01/01/1996 - present
Epigenetics and Chromatin	3.064	40	SpringerOpen 01/01/2008 - present
Cellular and Molecular Life Sciences	3.006	194	Springer Nature Journals 04/01/1945 - present
mSystems	2.979	19	American Society for Microbiology Journals 01/01/2016- present
RNA	2.963	158	PubMed Central (PMC) 01/01/1995 - present
Journal of Hematology and Oncology	2.960	60	BioMed Central 01/01/2008 - present
Cell Chemical Biology	2.945	166	ScienceDirect - Cell Press 01/01/2016 - present
Cell Discovery	2.855	15	PubMed Central (PMC) 01/01/2015 - present
Matrix Biology	2.829	106	ScienceDirect Freedom Collection 02/01/1995 - present
Molecular and Cellular Proteomics	2.807	169	PubMed Central (PMC) 01/01/2008 - present
Briefings in Bioinformatics	2.748	90	Oxford University Press 01/01/2006 - present
Molecular and Cellular Biology	2.603	308	HighWire Press 01/01/1981 - present
Stem Cells	2.592	205	Wiley Online Library 01/01/1996- present
RNA Biology	2.530	65	PubMed Central (PMC) 01/01/2009 - present
Biomolecules	2.525	37	PubMed Central (PMC) 01/01/2011 - present
Frontiers in Cell and Developmental Biology	2.515	31	PubMed Central (PMC) 01/01/2013 - present
Clinical Epigenetics	2.426	39	PubMed Central (PMC) 01/01/2010 - present
Journal of Biological Chemistry	2.403	477	PubMed Central (PMC) 01/01/2005 - present

Major Serial Titles			
Journal Title	SJR Index	H Index	USF Library Holdings
Tissue Barriers	2.401	119	PubMed Central (PMC) 01/01/2013 - present
Traffic	2.401	119	Wiley Online Library 01/01/2000- present
Cell Communication and Signaling	2.400	52	PubMed Central (PMC) 01/01/2003 - present
Frontiers in Synaptic Neuroscience	2.398	31	PubMed Central (PMC) 01/01/2009 - present
Biochimica et Biophysica Acta - Gene Regulatory Mechanisms	2.387	114	ScienceDirect Freedom Collection 01/01/2008 - present
Biochimica et Biophysica Acta - Molecular and Cell Biology of Lipids	2.342	147	ScienceDirect Freedom Collection 12/08/1998 - present
Protein & Cell	2.280	48	SpringerOpen 01/01/2010 - present
Molecular Microbiology	2.249	226	Wiley Online Library 01/01/1987- present
Methods	2.225	132	ScienceDirect 01/01/1993 - present
DNA Repair	2.224	104	ScienceDirect Freedom Collection 01/22/2002 - present
Cell Division	2.219	40	PubMed Central (PMC) 01/01/2006 - present
Epigenetics	2.208	77	Taylor & Francis Science & Technology Library 01/01/2006 - present
FEBS Journal	2.202	186	Wiley Online Library 01/01/2005- present
Biochimica et Biophysica Acta - Bioenergetics	2.200	154	ScienceDirect Open Access Titles 01/01/1995 - present
Molecular Phylogenetics and Evolution	2.179	142	ScienceDirect 03/01/1992 - present
mSphere	2.178	19	American Society for Microbiology Journals 01/01/2016- present
Journal of Molecular Cell Biology	2.154	52	Oxford University Press 01/01/2009 - present
Biomolecular Detection and Quantification	2.150	14	PubMed Central (PMC) 01/01/2014 - present
Biochemical Journal	2.142	243	Geneva Foundation Free Medical Journals 01/01/1906 - present
Journal of Lipid Research	2.119	172	HighWire Press 01/01/1959 - present

Major Serial Titles			
Journal Title	SJR Index	H Index	USF Library Holdings
Microbiology spectrum	2.093	32	American Society for Microbiology Journals 10/01/2013- present
Biochimica et Biophysica Acta - Molecular Cell Research	2.092	155	ScienceDirect Freedom Collection 02/16/1995 - present
Journal of Molecular and Cellular Cardiology	2.089	142	ScienceDirect 01/01/1993 - present
Plant and Cell Physiology	2.080	135	Oxford University Press 01/01/1996 - present
DNA Research	2.066	89	PubMed Central (PMC) 01/01/2007 - present
FASEB Journal	2.065	257	Publisher's Site 07/01/1987 - present

DATABASES and DIGITAL LIBRARIES

Scholarly, research and instructional activities associated with Cell and Molecular Biology endeavors are supported by a number of both specialized marine and general scientific databases, which provide access to indexes, journal articles, and monographs.

Key Cell and Molecular Biology Databases

BIOSIS Citation Index
BIOSIS Citation Index combines the carefully indexed life science coverage found in BIOSIS Previews (Biological Abstracts, Reports, Reviews, and Meetings) with the power of cited reference searching. Subject coverage is the same as that of BIOSIS Previews and includes traditional areas of biology like botany, zoology, and microbiology.
Medline (CSA-ProQuest)
MEDLINE on this service contains over 4 million citations and abstracts, providing unparalleled access to worldwide biomedical literature. The database contains a broad range of medical topics relating to research, clinical practice, administration, policy issues, and health care services. Produced by the U.S. National Library of Medicine, MEDLINE contains all records published in Index Medicus and since 2002, most citations previously included in separate NLM specialty databases such as SPACELINE and HISTLINE.
PubMed
PubMed was developed by the National Center for Biotechnology Information (NCBI). It was developed in conjunction with publishers of biomedical literature as a search tool for accessing literature citations and linking to full-text journals at web sites of participating publishers. Provides access to over 12 million Medline citations back to the mid-1960's and additional life science journals. PubMed, a service of the National Library of Medicine, includes over 15 million citations for biomedical articles back to the 1950's.
Scopus
Scopus is the largest abstract and citation database of peer-reviewed literature: scientific journals, books and conference proceedings. Delivering a comprehensive overview of the world's research output in the fields of science, technology, medicine, social sciences, and arts and humanities.
Web of Science

The ISI Web of Science provides seamless access to the Science Citation Expanded, Social Sciences Citation Index, and Arts & Humanities Citation Index. It enables users to search current and retrospective multidisciplinary information from approximately 8,500 of the most prestigious, high impact research journals in the world. ISI Web of Science also provides a unique search method, cited reference searching. With it, users can navigate forward, backward, and through the literature, searching all disciplines and time spans to uncover all the information relevant to their research. Users can also navigate to electronic full-text journal articles.

General Scientific Databases.

Annual Reviews
For over 70 years Annual Reviews has synthesized the vast amount of primary research literature available, offering critical review articles in 29 specific disciplines in the Biomedical, Physical and Social Sciences. The USF Libraries offer current access to the latest Annual Reviews and have also purchased an electronic collection of all Annual Reviews volumes ever published with content dating back to the very first volume of Annual Review of Biochemistry in 1932.
BioOne
BioOne aggregates over eighty high impact bioscience research journals. Most of BioOne's titles are published by small societies and non-commercial publishers, and, until now, have been available only in printed form. BioOne journals focus on the biological, ecological and environmental sciences.
BioMed Central
BioMed Central is an independent publishing house committed to providing immediate free access to peer-reviewed biomedical research.
Biological Science Database
The collection contains biological science related full-text articles, granular access to figures and tables within articles, and the entire range of bibliographic records from Biological Sciences database. Supporting over two dozen areas of expertise, Biological Sciences provides access to literature from serials, as well as conference proceedings, technical reports, monographs and selected books and patents.
Journals@Ovid
The database aggregates hundreds of scientific, technical, and medical journals from over 50 publishers and societies, with each journal available by individual subscription. Includes access and searching of all the bibliographic citations, references, and abstracts in the database as well as to the full text of select journals.
JSTOR
JSTOR (www.jstor.org) is a not-for-profit organization with a dual mission to create and maintain a trusted archive of important scholarly journals, and to provide access to these journals as widely as possible.
Nature Publishing
Provides indexing coverage for publications from the Nature Publishing Group; including biotechnology, cancer, chemistry, clinical medicine, dentistry, developmental biology, drug discovery, evolution & ecology, genetics, immunology, medicine, microbiology, molecular cell biology, neuroscience, pharmacology, and physics.
Oxford Academic Journals
Provides full-text online access to electronic journals published by the Oxford University Press. Disciplines covered are humanities, social sciences, and the sciences. A brief bibliographic description of each title is given in an "About this journal" section. The "Online journals" table lists the available online material for each journal. The full text of these online journals is generally available for the past several years, though abstracts of articles date back additional years.
SAGE Journals Online

Presents information about SAGE Publications, Inc. online journals. Allows keyword searching of article contents, as well as browsing articles by topic and journals by title. Includes an overview and history of the company, based in Thousand Oaks, California, which focuses on the social science, science, and electronic publishing fields. Links to information about books and other materials available from the company, along with ordering information.
ScienceDirect
A web database for scientific research that contains the full text of more than 2000 Elsevier Science journals in the life, physical, medical, technical, and social sciences available through the Internet. Contains abstracts and articles from the core journals in major scientific disciplines. The journals are arranged under subject areas for topical navigation.
SpringerLink
Provides online access to full text of journals from the Springer Publishing Group.
Taylor & Francis Online
Taylor & Francis Online is the journal content platform for the Taylor & Francis Group. The platform gives online access to all journals published by Taylor & Francis and Routledge.

- 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.**

As of September 13, 2019, the collections of the USF Tampa Library and affiliates are sufficient to support the new program proposal for a Bachelor of Science in Cell and Molecular Biology in the Department of Cell Biology, Microbiology, and Molecular Biology (CMMB) The Libraries maintain an exceptionally strong collection of resources and services needed to support USF as a Preeminent Research University. The librarians and Dean of the Libraries work closely with the College of Arts and Sciences to ensure all curricular and research needs are more than adequately supported. No additional resources are required to support the new program 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.**

CMMB is located in the Interdisciplinary Sciences Building (ISA) and contiguous Biosciences (BSA) buildings located on the USF Tampa campus. There is 24,000 sf of research laboratory space and 3,500 sf of office space assigned to CMMB in these buildings. There are also seven undergraduate teaching labs in ISA totaling 8,400 sf of dedicated space to graduate students teaching undergraduate laboratory courses. CMMB utilizes university wide classroom space for lecture courses. These spaces are sufficient to support the proposed program through Year 5.

CMMB Space Usage Table			
Building	Purpose	Square Feet	Description
ISA	Administration	2,090	Receptor, Staff, and Chair Offices
	Teaching Labs	8,000	7 Teaching labs of which 6 labs hold 24 student spaces and 1 holds 16 students spaces
	Teaching Support	1,100	Lab Preparations and Autoclaves
	Faculty Research Labs	7,730	Two large shared research laboratories

	Research Support	2,627	Autoclaves, equipment, and cold rooms, storage, glassware, and washing
	Faculty Offices	1,758	Approximately 120 sf each
BSF	Instructional Space	821	Small classroom, make-up exam room, small conference center
	Faculty Research Labs	11,538	550 sf labs, usually 2 assigned per faculty member
	Research Support	3,320	Equipment rooms, tissue culture, research service lab
	Faculty Offices	2,491	Mostly 100 sf offices, one large common TA room
	Storage	220	For records and unused equipment
IDRB	Research Labs	1,000	CDDI lab assigned to CMMB

The Department has a core lab that offers numerous services and has equipment available for use by faculty and students. In addition, CMMB faculty and students have access to larger core facilities at the Moffitt Cancer Center as well as at the Medical School and Center for Drug Discovery and Innovation (CDDI) including other USF departments such as Chemistry and Geosciences. New faculty members have generally received start-up funds in the range of \$300,000 to \$500,000 and there are considerable equipment holdings in individual research labs that are typically shared. Teaching lab equipment is maintained through lab equipment fees charged to students. This is accumulated over time to periodically replace and upgrade equipment.

In terms of classroom facilities, most classrooms at USF are scheduled centrally. The exceptions for CMMB are that we have a small classroom of approximately 34 seats in BSF and a conference room in ISA of approximately 20 seats used for smaller courses. Also, we have seven teaching labs for laboratory courses. The department space is summarized in the above table. Most of our courses have relatively large enrollments, and occupy a number of large lecture halls through USF Central Space and Scheduling. Additionally, smaller classrooms of 30-50 seats are also readily available. All of the classrooms and lecture halls are well maintained with computer equipped lecterns connected to projectors in addition to the availability of document cameras and interactive student response systems.

- 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, laboratory, or office space will be necessary.

- 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.**

Since no new capital expenditure for instructional or research space will be required, this section is 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.**

USF has abundant research infrastructure to support the endeavors of faculty and students. We possess departmental confocal microscopes, cell culture and microarray facilities. We also have extensive mass-spectrometric and lipidomic facilities as well as NMR instrumentation. Through various USF Health departments, we have access to animal experimental facilities, flow cytometers, fluorescent imaging systems, analytical and electron microscopes, laser micro-dissection, and histology tools. This is in addition to individual laboratory equipment and instrumentation in CMMB.

- 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 to sustain the new degree program in Cell and Molecular Biology.

- 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 specialized categories of resources are needed to sustain the new B.S degree in Cell and Molecular Biology.

- 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.**

The CMMB department has allocated Teaching Assistantships for the teaching and training of students in the CAM program in laboratory courses belonging to the major, including BSC 2010 (Cellular Processes), PCB 3063 (Genetics), PCB 3023 (Cell Biology), PCB 4024 (Molecular Biology of the Cell), and PCB 4026 (Molecular Biology of the Gene). Projected costs are included in **Table 2-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.**

Many of the undergraduate students in Cell and Molecular Biology enroll in BSC 4910 Undergraduate Research. In the 2017-2018 academic year, CMMB enrolled 57 undergraduates in BSC 4910. In most of the research faculty laboratories, senior graduate students mentor these students in their projects. If the student begins early enough in their academic programs, the projects may culminate into publications. Annually, the students are encouraged to present their projects, usually in poster format, at the USF Annual Celebration of Undergraduate Research. In addition, some research faculty members are able to support undergraduate students attending international symposia or research society meetings.

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**	31	28	36	32	41	37	46	41	51	46
Students who initially entered the university as FTIC students and who are progressing from the lower to the upper level***	515	464	595	536	650	585	750	675	820	738
Florida College System transfers to the upper level***	163	147	173	156	183	165	193	174	190	171
Transfers to the upper level from other Florida colleges and universities***	90	81	96	86	102	92	108	97	100	90
Transfers from out of state colleges and universities***	0	0	0	0	0	0	0	0	0	0
Other (Explain)***	0	0	0	0	0	0	0	0	0	0
Totals	799	719	900	810	976	878	1097	987	1161	1045

* 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 columns 1+...+7	Funding Source					Subtotal columns 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
Columns	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Faculty Salaries and Benefits	627,567	0	0	0	0	0	0	\$627,567	679,298	0	0	0	0	0	\$679,298
A & P Salaries and Benefits	29,767	0	0	0	0	0	0	\$29,767	32,220	0	0	0	0	0	\$32,220
USPS Salaries and Benefits	8,099	0	0	0	0	0	0	\$8,099	8,767	0	0	0	0	0	\$8,767
Other Personal Services	0	0	0	0	0	0	0	\$0	0	0	0	0	0	0	\$0
Assistantships & Fellowships	810,000	0	0	0	0	0	0	\$810,000	876,769	0	0	0	0	0	\$876,769
Library	0	0	0	0	0	0	0	\$0	0	0	0	0	0	0	\$0
Expenses	5,000	0	0	0	0	0	0	\$5,000	5,000	0	0	0	0	0	\$5,000
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	\$1,480,433	\$0	\$0	\$0	\$0	\$0	\$0	\$1,480,433	\$1,602,054	\$0	\$0	\$0	\$0	\$0	\$1,602,054

*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)	4.70	4.70
A & P (FTE)	0.55	0.55
USPS (FTE)	0.2	0.2

Calculated Cost per Student FTE

	Year 1	Year 5
Total E&G Funding	\$1,480,433	\$1,602,054
Annual Student FTE	719	1,045
E&G Cost per FTE	\$2,059	\$1,533

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	Richard Pollenz, Ph.D. Toxicology	Full Professor	Tenured	Fall 2020	9	0.75	40.00	0.20	9	0.75	40.00	0.20	
A	Kristina Schmidt, Ph.D. Molecular Biology	Full Professor	Tenured	Fall 2020	9	0.75	40.00	0.20	9	0.75	40.00	0.20	
A	Gary Daughdrill, Ph.D. Chemistry	Associate Professor	Tenured	Fall 2020	9	0.75	40.00	0.20	9	0.75	40.00	0.20	
A	Meera Nanjundan, Ph.D. Biochemistry	Associate Professor	Tenured	Fall 2020	9	0.75	40.00	0.20	9	0.75	40.00	0.20	
A	Brant Burkhardt, Ph.D. Immunology	Associate Professor	Tenured	Fall 2020	9	0.75	40.00	0.20	9	0.75	40.00	0.20	
A	Younghoon Kee, Ph.D. Cell and Molecular Biology	Associate Professor	Tenured	Fall 2020	9	0.75	40.00	0.20	9	0.75	40.00	0.20	
A	Sandra Westerheide, Ph.D. Genetics and Molecular Biology	Associate Professor	Tenured	Fall 2020	9	0.75	40.00	0.20	9	0.75	40.00	0.20	
A	Sameer Varma, Ph.D. Physics	Associate Professor	Tenured	Fall 2020	9	0.75	40.00	0.20	9	0.75	40.00	0.20	
A	Margaret Park, Ph.D. Genetics	Assistant Professor	Tenure- Earning	Fall 2020	9	0.75	40.00	0.20	9	0.75	40.00	0.20	
A	Huzefa Dungrawala, Ph.D. Biomedical Sciences	Assistant Professor	Tenure- Earning	Fall 2020	9	0.75	40.00	0.20	9	0.75	40.00	0.20	
A	Libin Ye, Ph.D. Biological Sciences	Assistant Professor	Tenure- Earning	Fall 2020	9	0.75	40.00	0.20	9	0.75	40.00	0.20	
A	Johnny El-Rady, Ph.D. Biological Sciences	Instructor III	Non-Tenure	Fall 2020	9	0.75	75.00	0.75	9	0.75	75.00	0.75	
A	Ashok Upadhyaya, Ph.D. Molecular and Cell Biology	Instructor II	Non-Tenure	Fall 2020	9	0.75	75.00	0.75	9	0.75	75.00	0.75	
A	Beth Jones-Mason, Ph.D. Immunology	Instructor II	Non-Tenure	Fall 2020	12	1.00	95.00	1.00	12	1.00	95.00	1.00	
Total Person-Years (PY)								4.70				4.70	
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					4.70				4.70	
B	New faculty to be hired on a vacant line		Current Education & General Revenue					0.00				0.00	
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	4.70			Year 5	4.70

Worksheet Table 4 Faculty

APPENDIX B

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



 Signature of Equal Opportunity Officer
 Digitally signed by Todd A. Chavez
 DN: cn=Todd A. Chavez, o=University of South
 Florida, ou=USF Libraries,
 email=tchavez@usf.edu, c=US
 Date: 2019.11.07 11:51:49 -0500
 Todd A. Chavez

_____ 11/8/19
 Date
 _____ 11/7/19
 Date

 Signature of Library Director

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: Burning Glass Data

EMPLOYMENT POTENTIAL – TAMPA BAY AREA

Metro Areas (MSAs)	Tampa-St. Petersburg-Clearwater, FL
Degree Level	Bachelor's degree
Time Period	4/1/2018 - 3/31/2019
Selected Programs	Cell/Cellular and Molecular Biology (26.0406)
Career Outcomes mapped to Selected Programs of Study	Biologist, Biochemist, Microbiologist, Medical Scientist, Chemist, Biological Technician, Chemical Technician, Researcher / Research Associate, Laboratory Technologist

HOW MANY JOBS ARE THERE FOR YOUR GRADUATES?

For your project criteria, there were **1,240** job postings in the last 12 months.

Compared to:

- 358,185 total job postings in your selected location
- 129,382 total job postings requesting a Bachelor's degree in your selected location

The number of jobs is expected to **grow** over the next 8 years.

GROWTH BY GEOGRAPHY

Geography	Selected Occupations	Total Labor Market	Relative Growth
Tampa, FL	23.82%	15.70%	High
Florida	22.92%	15.70%	High
Nationwide	9.72%	7.40%	Average

The average salary in Tampa-St. Petersburg-Clearwater, FL for graduates of your program is **\$50,772**. This average salary is **Above** the average living wage for Tampa-St. Petersburg-Clearwater, FL of \$29,141.

Salary numbers are based on Burning Glass models that consider advertised job posting salary, BLS data, and other proprietary and public sources of information.

Occupation Group	25 th Percentile	Average	75 th Percentile
Clinical Laboratory Technologists and Technicians	\$46,741	\$49,378	\$0
General Research	\$45,845	\$53,182	\$83,081
Health and Medical Research	\$45,735	\$0	\$0

Appendix C: Burning Glass Data

Chemical and Physical Science	\$58,698	\$56,681	\$0
Biological Science	\$42,480	\$56,668	\$0
Scientific Technicians	\$40,416	\$61,411	\$0

EMPLOYMENT POTENTIAL - FLORIDA

States	Florida
Degree Level	Bachelor's degree
Time Period	4/1/2018 - 3/31/2019
Selected Programs	Cell/Cellular and Molecular Biology (26.0406)
Career Outcomes mapped to Selected Programs of Study	Biologist, Biochemist, Microbiologist, Medical Scientist, Chemist, Biological Technician, Chemical Technician, Researcher / Research Associate, Laboratory Technologist

HOW MANY JOBS ARE THERE FOR YOUR GRADUATES?

For your project criteria, there were **5,863** job postings in the last 12 months.

Compared to:

- 1,622,167 total job postings in your selected location
- 542,534 total job postings requesting a Bachelor's degree in your selected location

The number of jobs is expected to **grow** over the next 8 years.

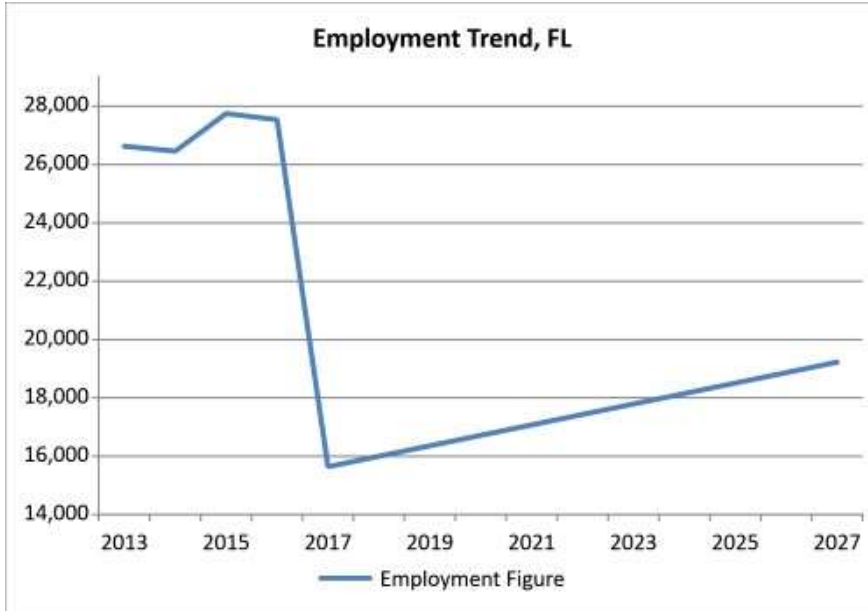
GROWTH BY GEOGRAPHY

Geography	Selected Occupations	Total Labor Market	Relative Growth
Florida	22.92%	15.70%	High
Nationwide	9.72%	7.40%	Average

HOW HAS EMPLOYMENT CHANGED FOR CAREER OUTCOMES OF YOUR PROGRAM?

	2013	2014	2015	2016	2017	2027
Employment (BLS)	26,630	26,460	27,750	27,540	15,640	19,225

Appendix C: Burning Glass Data



Employment data between years 2018 and 2027 are projected figures.

EMPLOYMENT POTENTIAL - NATIONWIDE

Location	Nationwide
Degree Level	Bachelor's degree
Time Period	4/1/2018 - 3/31/2019
Selected Programs	Cell/Cellular and Molecular Biology (26.0406)
Career Outcomes mapped to Selected Programs of Study	Biologist, Biochemist, Microbiologist, Medical Scientist, Chemist, Biological Technician, Chemical Technician, Researcher / Research Associate, Laboratory Technologist

HOW MANY JOBS ARE THERE FOR YOUR GRADUATES?

For your project criteria, there were 140,372 job postings in the last 12 months.

Compared to:

- 30,868,979 total job postings in your selected location
- 11,114,645 total job postings requesting a Bachelor's degree in your selected location

The number of jobs is expected to grow over the next 8 years.

Appendix C: Burning Glass Data

GROWTH BY GEOGRAPHY

Geography	Selected Occupations	Total Labor Market	Relative Growth
Nationwide	9.72%	7.40%	Average

HOW HAS EMPLOYMENT CHANGED FOR CAREER OUTCOMES OF YOUR PROGRAM?

	2013	2014	2015	2016	2017	2027
Employment (BLS)	644,710	656,020	669,700	697,620	528,510	579,870

Appendix D: Academic Learning Compact

Cell & Molecular Biology, Undergraduate, BS, Tampa

Mission Statement

The faculty in Department of Cell Biology, Microbiology, and Molecular Biology (CMMB) are committed to preparing students for professional careers in the area of cell and molecular biology through pursuing excellence in understanding structural, computational, and molecular cell biology. We serve the University, scientific and greater community by providing intellectual resources and engaging in scholarly activities that are consistent with our educational and research missions.

Goal 1: Discipline-Specific Knowledge

1a. Student Learning Outcome Statement

Students will develop a thorough understanding of (a) protein trafficking, (b) signal transduction, (c) cell cycle/division and cell death pathways.

2b. Student Learning Outcome Statement

Students will demonstrate competency in modern laboratory skills in two of the following: (a) pipetting, (b) gel loading, or (c) protein quantification (standard curve).

Goal 2: Critical Thinking Skills

2a. Student Learning Outcome Statement

Students will demonstrate their critical thinking skills in cell and molecular biology by critically analyzing experimental data and interpreting results; these competencies will be demonstrated in a written laboratory report.

Goal 3: Communication Skills

3a. Student Learning Outcome Statement

Students will demonstrate their ability to communicate in written works on molecular aspects of the gene including (a) sequence, structure, function of DNA, RNA, and protein, (b) chromosome structure and its importance in packaging and replication, and (c) the mechanisms involved in DNA replication, transcription, translation, and gene regulation.

Assessment Methods

Written Report or Essay
Instructor Constructed Exam
Class Performance or Presentation
Lab Reports

Appendix E: Eight-Semester Plan

Eight-Semester Plan							
CIP Code: 26.0406							
CIP Title: Cell/Cellular and Molecular Biology							
Degree Level: B							
Credential (Degree Type): B.S.							
USF Title (Major Name): Cell and Molecular Biology							

For any course and/or placeholder that must be taken in sequence and/or in the semester listed, please indicate such by inserting a (!) in the appropriate cell.

Fall 1								
	Current Course Prefix and Number	State Mandated Common Prerequisite	General Education Requirement	Supporting Course	Major Course	Major (Restricted) Elective	Unrestricted Elective	Total
	ENC 1101		✓					3
!	BSC 2010	✓	✓					3
!	BSC 2010L	✓						1
!	CHM 2045	✓						3
	CHM 2045L	✓						1
	Humanities		✓					3
Take the Civics Literacy Exam (Graduation Requirement)								0
Total Semester Credit Hours:								14

Spring 1								
	Current Course Prefix and Number	State Mandated Common Prerequisite	General Education Requirement	Supporting Course	Major Course	Major (Restricted) Elective	Unrestricted Elective	Total
	ENC 1102		✓					3
	BSC 2011	✓						3
	BSC 2011L	✓						1
!	CHM 2046	✓						3
	CHM 2046L	✓						1
	MAC 2311	✓	✓					4
Total Semester Credit Hours:								15

Summer 1								
	Current Course Prefix and Number	State Mandated Common Prerequisite	General Education Requirement	Supporting Course	Major Course	Major (Restricted) Elective	Unrestricted Elective	Total
	Creative Thinking		✓					3
	MAC 2312	✓						4
Total Semester Credit Hours:								7

Fall 2								
	Current Course Prefix and Number	State Mandated Common Prerequisite	General Education Requirement	Supporting Course	Major Course	Major (Restricted) Elective	Unrestricted Elective	Total
	XXX XXXX						✓	3
	CHM 2210	✓						3
	CHM 2210L	✓						2

Appendix E: Eight-Semester Plan

	Social Sciences		✓					3
	Human and Cultural Diversity		✓					3
Total Semester Credit Hours:								14

Spring 2								
	Current Course Prefix and Number	State Mandated Common Prerequisite	General Education Requirement	Supporting Course	Major Course	Major (Restricted) Elective	Unrestricted Elective	Total
	XXX XXXX						✓	3
	XXX XXXX						✓	3
	CHM 2211	✓						3
	CHM 2211L	✓						2
	Information and Data Literacy		✓					3
Total Semester Credit Hours:								14

Summer 2								
	Current Course Prefix and Number	State Mandated Common Prerequisite	General Education Requirement	Supporting Course	Major Course	Major (Restricted) Elective	Unrestricted Elective	Total
	XXX XXXX						✓	3
Total Semester Credit Hours:								3

Fall 3								
	Current Course Prefix and Number	State Mandated Common Prerequisite	General Education Requirement	Supporting Course	Major Course	Major (Restricted) Elective	Unrestricted Elective	Total
	PHY 2048			✓				3
	PHY 2048L			✓				1
!	MCB 3410				✓			3
!	PCB 3023				✓			3
	PCB 3023L				✓			1
	Major Elective					✓		3
Total Semester Credit Hours:								14

Spring 3								
	Current Course Prefix and Number	State Mandated Common Prerequisite	General Education Requirement	Supporting Course	Major Course	Major (Restricted) Elective	Unrestricted Elective	Total
	PHY 2049			✓				3
	PHY 2049L			✓				1
	PCB 4024 or PCB 4109 or PCB 4026				✓			3
	Major Elective					✓		3
!	PCB 3063				✓			3
	PCB 3063L				✓			1
Total Semester Credit Hours:								14

Summer 3								
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Appendix E: Eight-Semester Plan

Current Course Prefix and Number	State Mandated Common Prerequisite	General Education Requirement	Supporting Course	Major Course	Major (Restricted) Elective	Unrestricted Elective	Total
Recommendation: Internship or Research Opportunity							0
Total Semester Credit Hours:							0

Fall 4							
Current Course Prefix and Number	State Mandated Common Prerequisite	General Education Requirement	Supporting Course	Major Course	Major (Restricted) Elective	Unrestricted Elective	Total
Major Elective					✓		3
XXX XXXX Upper Level						✓	4
Ethical Reasoning and Civic Engagement		✓					3
PCB 4026 or PCB 4024 or PCB 4109				✓			3
Total Semester Credit Hours:							13

Spring 4							
Current Course Prefix and Number	State Mandated Common Prerequisite	General Education Requirement	Supporting Course	Major Course	Major (Restricted) Elective	Unrestricted Elective	Total
Major Elective					✓		3
Major Elective					✓		3
High Impact Practice		✓					3
XXX XXXX						✓	3
Total Semester Credit Hours:							12

Total Program Hours:							120
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Please note: BSC 2010, CHM 2045 and PHY 2048 are all State Core Natural Sciences General Education courses. However, in the semester plan, we have listed only BSC 2010 as meeting the requirement so the total general education credit hours is not inflated.

Appendix E: Four-Semester Plan

Four-Semester Plan CIP Code: 26.0406 CIP Title: Cell/Cellular and Molecular Biology Degree Level: B
Credential (Degree Type): B.S.
USF Title (Major Name): Cell and Molecular Biology

For any course and/or placeholder that must be taken in sequence and/or in the semester listed, please indicate such by inserting a (!) in the appropriate cell.

Fall 1								
	Current Course Prefix and Number	State Mandated Common Prerequisite	General Education Requirement	Supporting Course	Major Course	Major (Restricted) Elective	Unrestricted Elective	Total
	PHY 2048			✓				3
	PHY 2048L			✓				1
!	MCB 3410				✓			3
!	PCB 3023				✓			3
	PCB 3023L				✓			1
	Major Elective					✓		3
Total Semester Credit Hours:								14

Spring 1								
	Current Course Prefix and Number	State Mandated Common Prerequisite	General Education Requirement	Supporting Course	Major Course	Major (Restricted) Elective	Unrestricted Elective	Total
	PHY 2049			✓				3
	PHY 2049L			✓				1
	PCB 4024 or PCB 4109 or PCB 4026				✓			3
	Major Elective					✓		3
!	PCB 3063				✓			3
	PCB 3063L				✓			1
Total Semester Credit Hours:								15

Summer 1								
	Current Course Prefix and Number	State Mandated Common Prerequisite	General Education Requirement	Supporting Course	Major Course	Major (Restricted) Elective	Unrestricted Elective	Total
	XXX XXXX					✓		4
Recommendation: Internship or Research Opportunity								0
Total Semester Credit Hours:								4

Fall 2								
	Current Course Prefix and Number	State Mandated Common Prerequisite	General Education Requirement	Supporting Course	Major Course	Major (Restricted) Elective	Unrestricted Elective	Total
	Major Elective					✓		3
	XXX XXXX Upper Level						✓	4

Appendix E: Four-Semester Plan

XXX XXXX Upper Level						✓	3
PCB 4026 or PCB 4024 or PCB 4109				✓			3
Total Semester Credit Hours:							13

Spring 2							
Current Course Prefix and Number	State Mandated Common Prerequisite	General Education Requirement	Supporting Course	Major Course	Major (Restricted) Elective	Unrestricted Elective	Total
Major Elective					✓		3
Major Elective					✓		3
XXX XXXX Upper Level						✓	3
XXX XXXX Upper Level						✓	3
XXX XXXX						✓	3
Total Semester Credit Hours:							14

Total Program Hours:							60
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Appendix F: Faculty CVs

RICHARD POLLENZ**Education**

Ph.D	Cell, Molecular, and Structural Biology Northwestern University Chicago, Illinois	1986 - 1991
B.Sc	Toxicology Philadelphia College of Pharmacy and Science Philadelphia, PA	1983

Academic Experience

Director	HHMI-STEM Academy Program University of South Florida	2014 – present
Director	Office for Undergraduate Research University of South Florida	2011 – 2017
Associate Dean	Undergraduate Studies University of South Florida	2011 – 2017
Associate Dean	Graduate School University of South Florida	2008 – 2011
Professor	CMMB Department University of South Florida	2007 – present
Undergraduate Director	Department of Biology CMMB Division University of South Florida	2006 – 2008
Graduate Director	CMMB Department University of South Florida	2008
Associate Professor	Department of Biology University of South Florida	2000 – 2007
Associate Professor	Department of Biochemistry and Molecular Biology Medical University of South Carolina	1999 – 2000
Assistant Professor	Department of Biochemistry and Molecular Biology Medical University of South Carolina	1994 – 1999
Postdoctoral Fellow	University of Wisconsin Madison, WI	1993 – 1994
Postdoctoral Fellow	McArdle Laboratory for Cancer Research Madison, WI	1991 – 1993
Postdoctoral Fellow	Northwestern University Chicago, Illinois	1991

Honors and Awards

Griffith Scholarship, 1982 – 1983
 Presidents Award, 1983
 Markey Fellowship, 1986 – 1991
 NRSA Postdoctoral Fellowship, 1993 – 1994
 Health Sciences Foundation Developing Teacher Award, 1997 – 1998
 Health Sciences Foundation Developing Scholar Award, 1998 – 1999
 PharmD, Professor of the Year, 1998 – 1999
 Presidents Award for Academic Excellence, 2003
 Fellow of the American Association for the Advancement of Science (AAAS), 2013
 USF Outstanding Faculty Award, 2013

Service Activities Within and Outside of Institution

Chair, CMMB Tenure and Promotion Committee, 2017 – 2018
 Graduation Lead Marshal (Spring, Summer, Fall), 2013 – 2016
 Associate Dean USF Undergraduate Studies, 2013 – 2016
 Graduation Lead Marshall (Spring, Summer, Fall), 2012 – 2013

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Associate Dean USF Undergraduate Studies, 2012 – 2013
2013 – 2018 USF Strategic Planning Committee

Recent Publications

1. Findley-Van Nostrand D and Pollenz RS. Evaluating Psychosocial Mechanisms underlying STEM persistence in undergraduates: evidence of impact from a sixty-day pre-college engagement STEM academy program. *Cell Biology Education*, 2017.
2. Piazza LM, Smith D, and Pollenz RS. Creating librarian-mentored undergraduate research projects that promote innovative partnerships between campus units. *CUR Quarterly Online*, 2016.
3. Kawajiri K, Kobayashi Y, Ohtake F, Ikuta T, Matsushima Y, Mimura J, Pettersson S, Pollenz RS, Sakaki T, Hirokawa T, Akiyama T, Kurosumi M, Poellinger L, Kato S, Fijii-Kuriyama Y. Aryl hydrocarbon receptor suppresses intestinal carcinogenesis in ApcMin/+ mice with natural ligands. *PNAS*, 106: 16481-13486, 2009.
4. Dougherty EJ and Pollenz RS. Analysis of AH receptor-ARNT and AH receptor-ARNT2 complexes in vitro and in cell culture. *Toxicol Sci.* 203(1):191-206, 2008.
5. Evans BR, Karchner SI, Allan LL, Pollenz RS, Tanguay RL, Jenny MJ, Sherr DH, Hanh ME. Repression of aryl hydrocarbon receptor (AHR) signaling by AHR repressor (AHRR): Role of DNA binding and competition for ARNT. *Molecular Pharmacology.* 73(2):387-398, 2008.

Courses Taught

Sea Phages, BSC 2010L

Introductory Biology, BSC 2010

Mythbusting Synthetic Biology and Genetic Engineering, USF Honors College Course Director

Receptor-Mediated Signal Transduction, Graduate Level

Genetic Engineering, BSC 5425

Receptor Pharmacology, Advanced Graduate Level

Cell Biology Laboratory, PCB 3023L

Cell Biology, PCB 3023

Current Funded Grants

1. Howard Hughes Medical Institute (HHMI)
Program Director: Pollenz
A High Engagement Stem Academy for entering first year students to inspire achievement and persistence in STEM
Period: 2014 – 2019
Total Amount: \$1,200,000

Recent Invited Talks and Meeting Attended

1. Society of Toxicology Annual Meeting, 2016, New Orleans, LA: Session Co-Chair and Speaker
2. Society of Toxicology Annual Meeting, 2015, San Diego, CA: Session Chair and Speaker
3. Society of Toxicology Annual Meeting, 2014, Phoenix, AZ: Session Chair and Speaker
4. Society of Toxicology Annual Meeting, 2008, Seattle, WA: Course Chair and Speaker
5. Society of Toxicology Annual Meeting, 2006, San Diego, CA: Course Chair and Speaker

Appendix F: Faculty CVs

KRISTINA SCHMIDT**Education**

Ph.D	Molecular Biology University of Edinburgh, UK	2000
B.Sc	Biological Sciences University of Leipzig, Germany	1995

Academic Experience

Professor with Tenure	CMMB Department University of South Florida	2018 – present
Associate Professor with Tenure	CMMB Department University of South Florida	2012 – 2018
Member	Cancer Biology and Evolution Program Moffitt Cancer Center	2008 – present
Member	Florida Center of Excellence for Drug Discovery CDDI, University of South Florida	2007 – 2010
Assistant Professor (Tenure-Track)	CMMB Department University of South Florida	2006 – 2012
Postdoctoral Fellow	Ludwig Institute for Cancer Research University of California San Diego, CA	2000 – 2005

Current Membership in Professional Organizations

German Society for DNA Repair Research, 2017 – present
 Bloom's Syndrome Association, 2016 – present
 American Association for the Advancement of Science, 2016 – present
 American Society for Microbiology, 2006 – present
 Genetics Society of America, 2006 – present

Honors and Awards

Sabbatical Award, University of South Florida, 2014
 Outstanding Educator Award, CMMB Department, University of South Florida, 2012
 Outstanding Research Achievement Award, University of South Florida, 2009
 Faculty Development and Research Award, University of South Florida, 2006
 The New York Academy of Sciences Young Investigator Travel Award, 1998
 EMBO Travel Award, 1998
 James Rennie Bequest Travel Award, University of Edinburgh, UK, 1997
 The Darwin Trust of Edinburgh, Doctoral Fellowship, 1995 – 1998

Service Activities Within and Outside of Institution

MGA, NIH Study Section, (ad hoc) Member, 2018
 MGB, NIH Study Section, (ad hoc) Member, 2016 – 2018
 Fulbright US Student Program, National Selection Committee, 2014 – 2017
 Chair, Strategic Research Planning Committee, 2018 – present
 Chair, USF Consolidation Curriculum Cluster K11: Natural Sciences and Mathematics, 2019
 Member, CMMB Graduate Committee, 2017 – 2019
 Member, Tenure and Promotion Committee, 2015 – 2017

Recent Publications

1. Doerfler L, Syed S, and Schmidt K. Stimulation of homologous recombination by Sgs1 through Rad51 binding. *Genetics*, 2018.
2. Arora S, Deshpande RA, Budd M, Campbell J, Revere A, Zhang X, Schmidt KH, and Paull TT. Roles of Sae2 nuclease activity in DNA repair. *Mol Biol Cell*, 2017.

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3. Syed S, Desler C, Rasmussen LJ, and Schmidt KH. A novel Rrm3 function in restricting DNA replication via an Orc5-binding domain is genetically separable from Rrm3 function as an ATPase/helicase in facilitating fork progression. PLoS Genetics. 2016.
4. Vivek SM and Schmidt KH. Cellular defects caused by hypomorphic variants of the Bloom syndrome helicase gene BLM. Mol Genet Genomic Med, 2016.
5. Kennedy JA, Syed S, and Schmidt KH, Structural motifs critical for in vivo function and stability of the RecQ-mediated genome instability protein Rmi1. PLoS One, 2015.

Courses Taught

Molecular Genetics, PCB 5525
Advanced Scientific Writing, BSC 6956
Molecular Biology of the Gene, PCB 4026
General Genetics, PCB 3063
Lectures in Contemporary Biology, BSC 6930
Biomedical Genomics and Genetics, BCH 6511
Molecular Biology, BCH 6411

Current Funded Grants

1. R01 GM081425
NIH/NIGMS
Role: PI (Schmidt)
Role of the Bloom's syndrome DNA helicase in chromosome maintenance mechanisms.
Period: 08/2015 – 06/2019
2. R15 HL126113
NIH/NIHLB
Role: Co-Investigator (Schmidt)
Function and regulation of the Fanconi Anemia Pathway in DNA Repair
Period: 2015 – 2018

Appendix F: Faculty CVs

GARY DAUGHDRILL**Education**

Ph.D	Department of Chemistry University of Oregon Eugene, Oregon	1997
B.Sc	Department of Chemistry University of Alabama Tuscaloosa, Alabama	1992

Academic Experience

Associate Professor (Tenured)	University of South Florida CMMB Department	2008 – present
Associate Member	University of South Florida Center for Drug Discovery and Innovation	2008 – present
Associate Research Professor	Department of Biological Sciences University of Idaho Moscow, Idaho	2008
Adjunct Faculty	Bioinformatics and Computational Biology Program University of Idaho Moscow, Idaho	2003 – 2008
Affiliate Faculty	Department of Biochemistry School of Medicine University of Washington Seattle, Washington	2002 – 2008
Assistant Professor	Department of Microbiology, Molecular Biology, Biochemistry University of Idaho Moscow, Idaho	2000 – 2008
Affiliate Faculty	Department of Science Salt Lake Community College Salt Lake City, Utah	1997 - 1998

Honors and Awards

Undergraduate Research Award, University of Alabama
 BS in Chemistry with American Chemical Society Certification
 Graduated Phi Beta Kappa
 Graduated Magna Cum Lauda
 Research Scholar Grant from the American Cancer Society
 Awarded Tenure from the University of South Florida

Service Activities Within and Outside of Institution

Member, CAS Faculty Development Committee, 2018 – present
 Member, USF Graduate Curriculum Committee, 2018 – present
 Member, CMMB Graduate Committee, 2016 – 2018
 Member, SNSM Tenure and Promotion Committee, 2013 – 2015
 Member, CAS Faculty Development Committee, 2011 – 2013
 Member, USF Faculty Senate, 2010 – 2011
 Director, USF-CDDI NMR Core Facility, 2009 – 2012
 Director, UI Structural Biology Core Facility, 2003 – 2008

Recent Publications

1. Wei X, Wu S, Song T, Chen L, Gao M, Borchers W, **Daughdrill GW**, and Chen J. Secondary interaction between MDMX and p53 core domain inhibits p53 DNA binding. PNAS, 113(19):E2558-2563, 2016.

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2. Crabtree MD, Borcherds W, Poosapati A, Shammass SL, **Daughdrill GW**, and Clarke J. Conserved helix-flanking prolines modulate intrinsically disordered protein: target affinity by altering the lifetime of the bound complex. *Biochemistry*. 2017.
3. Borcherds W, Becker A, Chen L, Chen J, Chemes LB, and **Daughdrill GW**. Optimal affinity enhancement by a conserved flexible linker controls intramolecular p53 mimicry in MdmX. *Biophysical Journal*, 2017.
4. Borcherds WM and **Daughdrill GW**. Using NMR chemical shifts to determine residue-specific secondary structure populations for intrinsically disordered proteins. *Methods Enzymol*. 2018.
5. Poosapati A, Gregory E, Borcherds WM, Chemes LB, and **Daughdrill GW**. Uncoupling the folding and binding of an intrinsically disordered protein. *J Mol Biol*, 2018.

Courses Taught

Inorganic Chemistry, Salt Lake Community College, 1998
Organic Chemistry, Salt Lake Community College, 1998
Biophysical Chemistry, University of Idaho, 2002-2007
Teachers Workshop, University of Idaho, 2003
Protein Structure and Function, University of Idaho, 2002-2007
Advanced Topics in Biochemistry, University of Idaho, 2004-2007
Cell Biology, University of South Florida, 2009-2011
Structural Biology, University of South Florida, 2013-2015
Scientific Writing, University of South Florida, 2013-2014
Advanced in Scientific Review, University of South Florida, 2014-2016
Lectures in Contemporary Biology, University of South Florida, 2013-2016
Molecular Biology of the Cell, University of South Florida, 2016-2018

Current Funded Grants

1. 2R01CA14124406-A1 (PIs: Chen, Daughdrill)
Period: 03/01/2015-02/29/2020
National Institute of Health
Mechanism of p53 activation during stress response
2. 1R01GM115556-01A1 (PIs: Daughdrill, Chen)
Period: 06/01/16-05/31/20
National Institute of Health
Intrinsic disorder controls the function of p53 and other cancer associated IDPs.

Recent Invited Talks and Meeting Attended

1. Seminar entitled "Levels of Disorder and Residual Helicity Alter p53-Mdm2 Binding Affinity and Signaling in Cells" at the Telluride Science Research Center Workshop on Intrinsically Disordered Proteins in Telluride, CO, 2015.
2. Keynote seminar entitled "Precise Levels of Transient Helical Structure are Required for IDR Function" at the Gordon Research Conference on Intrinsically Disordered Proteins
3. Seminar entitled "Using Evolution and Physics to engineer the conformational ensembles of IDPs" at the Telluride Science Research Center Workshop on Intrinsically Disordered Proteins in Telluride, CO, 2017
4. Seminar entitled "Evolution of Protein Disorder" at Potsdam University, Potsdam, Germany, 2018
5. Seminar entitled "Protein Disorder Controls the p53 Network" at the 9th International Mdm2 Conference, St. Petersburg, Florida, 2018

Appendix F: Faculty CVs

MEERA NANJUNDAN**Education**

Ph.D	Department of Biochemistry University of Western Ontario, London, Ontario, CANADA	1996 - 2001
B.Sc	Department of Biochemistry Queen's University at Kingston, Ontario, CANADA	1992 - 1996

Academic Experience

Associate Professor (Tenured)	University of South Florida CMMB Department	2014 – present
Joint Faculty	University of South Florida Department of Ob & Gyn College of Medicine	2013 – present
Undergraduate Director	University of South Florida CMMB Department	2015 - 2017
Assistant Professor (Tenure Track)	University of South Florida CMMB Department	2008 – 2014
Research Assistant Professor	Department of Systems Biology U.T. MD Anderson Cancer Center Houston, TX	2007
Postdoctoral Fellow	Department of Systems Biology U.T. MD Anderson Cancer Center Houston, TX	2003 – 2007
Postdoctoral Fellow	Department of Molecular Therapeutics The Scripps Research Institute La Jolla, CA	2001 – 2003

Current Membership in Professional Organizations

American Association for Cancer Research, 2009 – present
National Academy of Inventors, USF Chapter, 2012 – present

Honors and Awards

USF CAS ORS Travel Award, 2018
USF CAS ORD Travel Award, 2017
USF Faculty International Travel Grant, 2017
USF Conference Travel Grant, 2016
USF Outstanding Researcher Award, 2015
USF Pilot Project Award, 2015
USF Conference Travel Grant, 2013
USF Faculty International Conference Grant, 2010
USF New Researcher Grant, 2008
Lung SPORE (PO50 CA070907) Career Development Investigator Award, 2006
Bristol-Myers Squibb Translational Research Award, 2005
Ontario Graduate Scholarship in Science & Technology (OGSST), 1999
Special University Scholarship (SUS), 1996 – 2000

Service Activities Within and Outside of Institution

CMMB, Academic Learning Compact (ALC) Committee, Fall 2015 – present
CMMB, Undergraduate Committee, 2015 – present
Chair, Faculty Search Committee (Senior Recruits), 2018 – present
SNSM, Undergraduate Program Committee, 2015 – 2017
Judge, University of South Florida Young Innovator's Competition, 2013 – 2017
Judge, Annual USF Graduate Student and Postdoctoral Research Symposium, 2014 – present
Ad hoc Reviewer, NCI Study Section Panel - Molecular Oncogenesis Study Section (MONC), 2017

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Ad hoc Reviewer, US Dept Veterans Affairs, VA Meric Grant Review Pane, ONCA and ONCD study section panel, 2015 – 2016

Ad hoc Reviewer, Tenova Cancer Center, Cardiff, UK

Recent Publications

1. Rockfield S, Guergues J, Rehman N, Smith A, Bauckman K, Stevens S, and Nanjundan M. Proteomic Profiling of Iron-Treated Ovarian Cells Identifies AKT Activation which Modulates the CLEAR Network. *Proteomics*, 2018.
2. Rockfield S, Chhabra R, Robertson M, Rehman M, Rehman N, Bisht R, and Nanjundan M. Links between Iron and Lipids: Implications in Some Major Human Diseases. *Pharmaceuticals (Basel)*. 2018.
3. Rockfield S, Flores I, and Nanjundan M. Expression and Function of Nuclear Receptor Coactivator 4 in Transformed Endometriotic and Malignant Ovarian Cells. *Oncotarget*. 2018.
4. Rockfield S, Raffel J, Mehta R, Rehman N, and Nanjundan M. Iron Overload and Altered Iron Metabolism in Ovarian Cancer. *Biol Chem*, 2017.
5. Mateo F et al (Including Nanjundan M). Stem cell-like Transcriptional Reprogramming Mediates Metastatic Resistant to mTOR Inhibition. *Oncogene*, 2016.

Courses Taught

Molecular Biology of the Cell (PCB 4024)

Cell Biology (PCB 3023)

Genetic Engineering and Recombinant DNA Technology (BSC 5425)

Current Funded Grants

1. Fulbright Scholar Program (PI: Nanjundan)
US Core Scholar Award (9089-JA, Tokushima University, Japan)
Implementation of a “Flipped” Mentor-Guided Learning Experience and Investigation of Lipid “Flipping” in Peroxisome Diseases
Total amount: \$50,339
Period: 2019-2020 Academic Year (10 months)
2. 1R03CA212696-01A1 (PI: Nanjundan)
National Cancer Institute
The Role of the miRNA Cluster at 14q32 in Lipid Regulation and Renal Cancer Biology
Total Amount: \$149,500
Period: 07/2017 – 06/2020 (with No-cost Extension)

Recent Invited Talks and Meeting Attended

1. Invited Oral Presentation, Moffitt Cancer Center, 1st Annual Ob/Gyn Oncology Retreat, 2017
2. Invited Oral Presentation, 13th World Endometriosis Congress, Vancouver, British Columbia, CANADA, 2017
3. Invited Oral Presentation, London Regional Cancer Center, London, CANADA, 2018
4. Invited Oral Presentation, University of Western Ontario, London, CANADA, 2018
5. Poster Presentation, EMBO Conference, Autophagy signaling and Progression in Health and Disease, Chia, Italy, 2015
6. Poster Presentation, FASEB Conference, Lipid Droplets, Snowmass, Colorado, 2016
7. Poster Presentation, Gordon Research Conference, Molecular and Cellular Biology of Lipids, Waterville Valley, NH, 2017

Appendix F: Faculty CVs

BRANT BURKHARDT**Education**

Ph.D	Microbiology/Immunology University of Florida	1996 – 2001
M.Sc	Microbiology Clemson University	1994 - 1996
B.Sc	Biology College of New Jersey	1989 - 1993

Academic Experience

Associate Professor (Tenured)	University of South Florida CMMB Department Health Informatics Institute	2017 – present
Assistant Professor (Tenure Track)	University of South Florida CMMB Department Health Informatics Institute	2011 – 2017
Adjunct Professor	Burlington County College Department of Science, Math, and Technology	2010
Senior Research Associate	Children's Hospital of Philadelphia Research Institute Department of Pathology and Laboratory Medicine	2006 – 2010
Postdoctoral Fellow	University of Pennsylvania Department of Pathology and Laboratory Medicine	2003 - 2006
Postdoctoral Fellow	University of Florida Center for Immunology and Transplantation Dept of Pathology/Immunology/Laboratory Medicine	2001 - 2003

Current Membership in Professional Organizations

Editorial Board Member, ISRN Endocrinology	2010 – present
Editorial Board Member, BioMed Research International	2012 – present
Permanent Member of ADA Basic Research Panel	2018 – 2021

Honors and Awards

Graduate Teaching Assistantship, Biology Dept, Clemson University	1994 – 1996
National Institute of Health Predoctoral Research Fellowship in Infection Diseases	1997 – 1999
Outstanding Paper Presentation in Molecular Biology, University of Florida	1999, 2000
National Institute of Health Postdoctoral Fellowship: Diabetes and Endocrinology	2003 – 2006
University of South Florida New Researcher Award	2012

Service Activities Within and Outside of Institution

CMMB - Faculty Advisory Committee	2016 – present
CMMB - Undergraduate Committee	2015 – present
CMMB – Graduate Committee	2013 – 2015
CMMB – Faculty Advisory Committee	2012 – 2013
SNSM – Tenure and Promotion Committee	2018 – present

Recent Publications

1. MarElia CM, Sharp AE, Shemwell TA, Zhang YC, and Burkhardt BR. 2018. Anemarrhena asphodeloides Buge and its constituents timosaponin-AIII induce cell cycle arrest and apoptosis in pancreatic cancer cells. FEBS open. 8(7): 1155-1166.
2. MarElia CM, Kuehl MK, Shemwell TA, Alman AC, and Burkhardt BR. 2018. Circulating PANDER concentration is associated with increased HbA1c and fasting blood glucose in Type 2 diabetic subjects. Journal of Clinical and Translational Endocrinology. 11:26030.
3. Lonrot M, Lynch KF, Elding Larsson H, Lernmark A, Rewers MJ, Torn C, Burkhardt BR, Briese T, Hagopian WA, She JX, Simell OG, Toppari J, Ziegler AG, Akolkar B, Krischer JP, Hyoty H, TEDDY Study Group. 2017.

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Respiratory infections are temporally associated with initiation of type 1 diabetes autoimmunity: the TEDDY study. *Diabetologia*. 60(10): 1931-1940.

4. Alman AC, Smith SR, Ecklet RH, Hokanson JE, Burkhardt BR, Sudini PR, Wu Y, Schauer IE, Pereira RI, and Snell-Bergeon JK 2017. The ratio of pericardial to subcutaneous adipose tissues is associated with insulin resistance. *Obesity*. 25(7): 1284-1291.
5. Athanason MG, Stevens SM, and Burkhardt BR. 2016. Hepatic SILAC proteomic data from PANDER transgenic model. *Data in Brief*. 16(9): 159-62.

Courses Taught

MCB4503 – Virology
 PCB 4234 – Principles of Immunology
 PCB 6093 – Advances in Scientific Review
 BSC 6935 – Graduate Seminar in Biology

Current Funded Grants

1 R03 AA026438-01 NIH-NIAAAA Role: PI "PHT1 knockout for investigation of ethanol-induced hepatic steatosis"	Burkhardt (PI)	09/01/18-08/31/2020
1 R01 AA026082-01A1 NIH-NIAAAA Role: Co-Investigator "The Role of Histone Demethylase KDM5B in Ethanol-Induced Microglial Activation"	Stevens (PI)	09/10/17-06/30-2022
1 R01 DE026480-01 NIH-NIDCR Role: Co-Investigator "The Oral Microbiome in Type I Diabetes and Sub-Clinical Cardiovascular Disease"	Alman (PI)	12/01/16-11/30/2021

Recent Invited Talks and Meeting Attended

1. Marelia CB and Burkhardt BR. *Anemarrhena aspedeloides* and its constituent timosaponin-AIII mitigate gemcitabine resistance in pancreatic cancer cells through increased deoxycytidine kinase expression. AACR Special Conference on Pancreatic Cancer: Advances in Science and Clinical Care, September 21-24, 2018, Boston, MA, USA
2. Sharp A, Kazantasis M, and Burkhardt BR. Examining the pancreatic B-cell line proliferative and inflammatory effects of *Cornus Officinalis*. Keystone Symposia – Frontiers in Islet Biology and Diabetes, February 4 – 8, 2018. Keystone, Colorado, USA.
3. Xu L, Cheng F, O'Brien JL, Ajami N, Burkhardt BR, Snell-Bergeon JK, Petrosino JF, and Alman AC. Identify Taxonomic Profiles of the Salivary Microbiome Associated with Type I Diabetes. APHA Annual Meeting. November 4 – 8, 2017, Atlanta, GA, USA.
4. Martin D, Burkhardt BR, and Stevens SM. Proteomic analysis reveals role of the phosphohistidine phosphatase PHPT1 in ethanol-induced hepatic steatosis. 65th ASMS Conference. June 4 – 8, 2017, Indianapolis, IND, USA.
5. Marelia CM and Burkhardt BR. *Anemarrhena rhizome* and *Schisandra chinensis* inhibit viability and promote apoptosis in pancreatic cancer cell lines. American Association for Cancer Research Annual Meeting, April 16 – 20, 2016, New Orleans, LA, USA.

Appendix F: Faculty CVs

YOUNGHOON KEE**Education**

Ph.D	Cell and Molecular Biology University of Texas at Austin	2001 - 2006
M.Sc	Hankuk University of Foreign Studies (HUFS) Yong-in, South Korea	1999 - 2001
B.Sc	Hankuk University of Foreign Studies (HUFS) Yong-in, South Korea	1992 - 1998

Academic Experience

Associate Professor (Tenured)	University of South Florida CMMB Department Health Informatics Institute	2017 – present
Assistant Professor (Tenure Track)	University of South Florida CMMB Department	2011 – 2017
Postdoctoral Fellow	Dana-Farber Cancer Institute Harvard Medical School Boston, MA	2007 - 2011

Current Membership in Professional Organizations

Collaborator Member, Moffitt Cancer Center, Tampa, Florida, 2011 – present
 Korean-American Scientists and Engineers Association (KSEA), 2011 – present
 American Society of Cell Biology (ASCB) Member, 2016 – present

Honors and Awards

2005, A.P. Bradie Endowed Golden Research Award (UT-Austin)
 2006, Outstanding Teaching Award (UT-Austin)
 2008 – 2011, Career Development Fellowship, Leukemia and Lymphoma Society
 2008, Honor Award, Leukemia and Lymphoma Society Naming Program
 2014, USF New Researcher Grant Award
 2014, Moffitt-ACS Institutional Grant Award

Service Activities Within and Outside of Institution

CMMB, Faculty Advisory Committee, 2015 – present
 CMMB, Graduate Program Committee, 2015 – 2017
 USF Graduate Symposium Judge, 2016
 CAS, Faculty Development Committee, 2013- 2015
 CMMB Undergraduate Research Committee, 2012 – 2013
 CMMB, Academic Learning Compact Committee, 2012 – 2013

Recent Publications

1. Sundaravinayagam D, Kim H, Wu T, Jun S, Lee HS, Chang I, Kee Y, You HJ, and Lee JH. miR146a-mediated targeting of FANCM during inflammation compromises genomic integrity. *Oncotarget* 2016.
2. Jayabalan A, Sanchez A, Park RY, Paik J, Anderson P, Kee Y, and Ohn T. Neddylation promotes stress granule assembly. *Nature Communications*. 2016.
3. Cukras S, Lee E, Palumbo E, Benavidez P, Moldovan GL, Kee Y. USP1 –UAF1 interacts with RAD51AP1 to promote homologous recombination repair. *Cell Cycle*, 2016.
4. Sanchez A, De Vivo A, Uprety N, Kim J, Stevens SM Jr., Kee Y. The BMI1-UBR5 axis regulates transcription repression at damaged chromatin. *PNAS*, 2016.
5. Kee Y. Putting brakes on transcription at damaged chromatin: Do Polycomb silencers do more than modify histones? Author's view. *Molecular and Cellular Oncology*, 2016.

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Courses Taught

Molecular Biology of the Cell (PCB 4024)

Advanced Cell Biology (PCB 6017)

Cell Biology (PCB 3023)

Current Funded Grants

1. R15HL126113-01A1 (PI: Kee)
Period: 08/01/2015-07/31/2018
Total Amount: \$439,000
Functional and Regulation of the Fanconi Anemia DNA Repair Pathway
2. R01GM117602-01A1 (PI: Kee)
Period: 02/01/2017-01/31/2022
Total Amount: \$1,500,000
Role of UBR5 in the PRC1-mediated transcription repression during DNA damage response

Recent Invited Talks and Meeting Attended

1. The ubiquitin system and DNA damage response. Institute of Basic Science, Ulsan, Korea. 2016
2. An insight into Polycomb-mediated transcriptional repression at damaged chromatin. Chosun University, Kwangju, Korea, 2017
3. An insight into Polycomb-mediated transcriptional repression at damaged chromatin. Yonsei University, Wonju, Korea, 2017
4. An insight into Polycomb-mediated transcriptional repression at damaged chromatin. University of South Florida College of Medicine, 2017
5. An insight into Polycomb-mediated transcriptional repression at damaged chromatin. PennState University College of Medicine, 2017
6. De Vivo A, Sanchez A, Yegres J, Ahmad A, Kee Y. UBR5 (E3) – OTUD (DUB) interplay in the transcriptional regulation at damaged chromatin. Cold Spring Harbor Laboratory Conference on Ubiquitin Family. New York, 2017
7. De Vivo A, Sanchez A, Kee Y. UBR5-OTUD5 interplay in the transcriptional regulation at damaged chromatin. Korean Society for Biochemistry and Molecular Biology International Meeting. Busan, Korea, 2017
8. De Vivo A, Sanchez A, Kee Y. UBR5-OTUD5 interplay in the transcriptional regulation at damaged chromatin. Cold Spring Harbor Laboratory conference on Eukaryotic Replication and Genome Maintenance. New York, 2017.

Appendix F: Faculty CVs

SANDRA WESTERHEIDE**Education**

Ph.D	Genetics and Molecular Biology Emory University Atlanta, GA	1992 - 1998
B.Arts	Biology Rice University Houston, Texas	1988 - 1992

Academic Experience

Associate Professor with Tenure	CMMB Department University of South Florida	2017 – present
Assistant Professor (Tenure-Track)	CMMB Department University of South Florida	2010 – 2017
Postdoctoral Fellow	Northwestern University Evanston, Illinois	2002 – 2009
Postdoctoral Fellow	University of North Carolina Chapel Hill, North Carolina	1998 – 2002

Current Membership in Professional Organizations

Member, Council for Undergraduate Research, 2015 – present
 Academic Editor, PLOS One, 2012 – 2016
 Moffitt Cancer Center, Collaborator Member, 2010 – 2016
 Member, American Association for the Advancement of Science, 1992 – present
 Cell Stress Society International, 2018 – present

Honors and Awards

USF Proposal Enhancement Grant, 2015 – 2016
 USF Faculty International Travel Grant, 2014
 National Institute of Health Postdoctoral Training Grant, Northwestern University, 2002 – 2004
 American Cancer Society, Postdoctoral Fellowship, 1999 – 2002
 National Institute of Health Postdoctoral Fellowship, 1999 (Declined)
 National Institute of Health Postdoctoral Training Grant, University of North Carolina, 1998 – 1999
 National Institute of Health Predoctoral Training grant, Emory University, 1993 – 1995
 National Merit Scholarship, 1988 - 1992

Service Activities Within and Outside of Institution

Ad Hoc Reviewer, Special Emphasis Panel, COBRE I Applications, 2018
 Ad-Hoc Reviewer, NH MBPP and CMAD Study Sections, 2015
 Editor, PLOS One, 2012 – 2016
 Co-chair, Midwest Stress Meeting, 2019
 Co-organizer, Florida Work Meeting, 2019
 CMMB, Faculty Hiring Committee, 2018 – present
 CMMB, Faculty Advisory Committee, 2017 – present
 CMMB Seminar Director, 2016 – 2018
 CMMB, Undergraduate Club Faculty Advisor, 2017 – 2018
 CMMB, Undergraduate Program Committee, 2011 – 2015
 CMMB, Graduate Committee Member, 2018 – present
 Goldwater Review Panel Member, 2016 - present

Recent Publications

1. Brunquell J, Raynes R, Bowers P, Morris S, Snyder A, Lugano D, Deonarine A, and Westerheide SD. CCAR-1 is a negative regulator of the heat-shock response in *C. elegans*. *Aging Cell*, 2018.

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2. Brunquell J, Cheng F, and Westerheide SD. HSF-1 is a regulator of miRNA expression in C elegans. PLOS One, 2017.
3. Brunquell J, Morris S, Snyder A, and Westerheide SD. Coffee extract and caffeine enhance the heat shock response and promote proteostasis in an HSF-1 dependent manner in C elegans. Cell, Stress, and Chaperones. 2017.
4. Paullin T, Powell CD, Menzie C, Hill R, Cheng F, Martyniuk CJ, and Westerheide SD. Spheroid growth in ovarian cancer alters transcriptome responses for stress pathways and epigenetic responses. PLOS One, 2017.
5. Jung AAW, Liu T, Trotter C, Fang C, De Narvaez E, LePochat P, Maslar D, Bukhari A, Deonarine A, Westerheide SD, and Kang DE. Loss of function CHCHD10 mutations in cytoplasmic TDP-43 mislocalization and synaptic integrity. Nature Communications. 2017.

Courses Taught

Cell Biology, PCB 3023

Molecular Biology of the Cell, PCB 4024

Advanced Cell Biology, BSC 6932

Scientific Grant Writing, BSC 6956

Cancer Biology, PCB 4109

Current Funded Grants

1. R15 AG052149-01
NIH/NIA
Control of the C elegans heat shock response by LST-3
Period: 9/01/16 – 08/31/2019
Role: PI (Westerheide)

Appendix F: Faculty CVs

SAMEER VARMA**Education**

Ph.D	Biophysics University of Illinois Urbana-Champaign, IL	2005
M.Sc	Physics Indian Institute of Technology Kharagpur, India	1999

Academic Experience

Associate Professor with Tenure	CMMB Department University of South Florida	2017 – present
Assistant Professor (Tenure-Track)	CMMB Department University of South Florida	2011 – 2017
Fellow	Institute of Pure Applied Math University of California – Los Angeles	2011
Research Assistant Professor	Illinois Institute of Technology Chicago, Illinois	2009 – 2010
Postdoctoral Fellow	Sandia National Laboratories Albuquerque, New Mexico	2005 – 2009

Current Membership in Professional Organizations

American Society for Virology, 2017 – present
 American Chemical Society, 2007 – present
 American Biophysical Society, 2002 - present

Honors and Awards

USF Outstanding Researcher Award, 2017
 ACS Emerging Technology in Computational Chemistry, 2013
 R&D100 Award for Developing novel water desalination membrane, 2011
 Fellow, Institute for Pure and Applied Math, UCLA, 2011
 AAAS Donald J Nask Memorial award, 2008
 Sandia Science and Technology Achievement Award, 2007
 New and Notable Research, American Biophysical Society, 2007
 University of Illinois Graduate Fellowship, 1999

Service Activities Within and Outside of Institution

1. CMMB, Faculty Advisory Committee, 2018 – present
2. SNSM Tenure Promotion Committee, 2017 – present
3. CMMB, Faculty Hiring Committee, 2017 – present
4. CMMB, Undergraduate Program Committee, 2015 – present
5. CAS, Technology Committee, 2017 – present
6. CAS, Computer Committee, 2012 – 2017

Recent Publications

1. Wineman-Fisher V, Al-Hamdani Y, Addou I, Tkatchenko A, **Varma S**. Ion-Hydroxyl Interactions: From High-Level Quantum Benchmarks to Transferable Polarizable Force Fields. *J Chem Theory Comput*. 2019
2. Saunders M, Steele M, Lavigne W, **Varma S**, Pandit SA. Interaction of salt with ether- and ester-linked phospholipid bilayers. *Biochim Biophys Acta Biomembr*. 2019
3. Botlani M, Siddiqui A, **Varma S**. Machine learning approaches to evaluate correlation patterns in allosteric signaling: A case study of the PDZ2 domain. *J Chem Phys*. 2018
4. Dutta P, Siddiqui A, Botlani M, **Varma S**. Stimulation of Nipah Fusion: Small Intradomain Changes Trigger Extensive Interdomain Rearrangements. *Biophys J*. 2016
5. **Varma S**, Orgel JP, Schieber JD. Nanomechanics of Type I Collagen. *Biophys J*. 2016

Appendix F: Faculty CVs

Courses Taught

Cell Biology, PCB 3023

Molecular Biology of the Cell, PCB 4024

Computational Biology, BSC 6932

Current Funded Grants

1. R01 GM118697
NIH/NIGMS
Accurate and efficient modeling of biomolecular ionic interactions: polarization, dispersion, and charge-redistribution
Period: 09/16 – 09/20
Role: PI (Varma)

2. R01 AA026082
NIH/NIAA
The role of histone demethyltransferase KDM5B in ethanol-induced microglial activation
Period: 09/17 – 06/22
Role: Co-Investigator (Varma)

Appendix F: Faculty CVs

MARGARET PARK**Education**

M.Sc	Clinical and Translational Sciences Virginia Commonwealth University Richmond, Virginia	2013 - 2015
Ph.D	Human Genetics Tulane University New Orleans, Louisiana	1999 - 2005
B.Sc	Biology Erskine College Due West South Carolina	1995 – 1999

Academic Experience

Assistant Professor (Tenure-Track)	University of South Florida CMMB Department	2017 – present
Research Assistant Professor	Virginia Commonwealth University Department of Biochemistry, Cell, and Molecular Biology	2011 – 2017
Visiting Professor	University of Richmond Department of Biology Richmond, VA	2010 – 2011
Faculty Instructor	Massey Cancer Center Department of Biochemistry Richmond, VA	2009 – 2010
Teaching Assistant	RAMPs Program – Biochemistry School of Dentistry Virginia Commonwealth University Richmond, VA	2009
Adjunct Faculty, Part-Time	University of Richmond Department of Biology Richmond, VA	2007
Postdoctoral Fellow	Virginia Commonwealth University Department of Biochemistry Massey Cancer Center Richmond, VA	2005 – 2009
Postdoctoral Fellow	Tulane University Department of Human Genetics New Orleans, LA	2005
Laboratory Technician	Tulane University Biochemical Genetics Diagnostic Laboratory	1999 – 2001

Current Membership in Professional Organizations

Member, American Association for the Advancement of Science	2007 – present
Member, American Association for Cancer Research	2007 – present
Member, Massey Cancer Center, Cell Signaling Group	2013 – 2017
Member, Moffitt Cancer Center, Cancer Signaling, and Development Program	2018 – present
Member, Moffitt Cancer Center, Non-Coding RNA Club	2018 – present

Honors and Awards

Recipient of an NRSA Institutional Fellowship (VCU Massey Cancer Center)	2008 – 2009
Recipient of an NRSA Institutional Fellowship (VCU, Dept of Gastroenterology)	2006 – 2008
B.Sc awarded cum laude, Erskine College	1999
E.B. Kennedy Semi-Finalist Award	1995 – 1999

Service Activities Within and Outside of Institution

Appendix F: Faculty CVs

CMMB, Ad-Hoc Committee Instructor Search	2019
CMMB, Seminar Committee Co-Chair	2017 – present
CMMB, Graduate Committee Member	2017 – present
CMMB, Ad-Hoc Committee for Instructor Promotion	2017
CMMB, Ad-Hoc Committee Instructor Search	2018
Grant Reviewer, Czech Science Foundation (Grant #19-19018S)	2018

Recent Publications

1. DeLigio JT, Lin G, Chalfant CE, Park MA. Splice variants of cytosolic polyadenylation element binding protein 2 (CPEB2) differentially regulate pathways linked to cancer metastasis. *J Biol Chem*, 2017.
2. Vhuyian MI, Pak ML, Park MA, Thomas D, Lakowski TM, Chalfant CE, Frankel A. PRMT2 interacts with splicing factors and regulates the alternative splicing of BCL-X. *J Biochem*. 2017.
3. Shapiro BA, Vu NT, Shultz MD, Shultz JC, Mietla JA, Gouda MM, Yacoub A, Dent P, Fisher PB, Park MA, Chalfant CE. Melanoma differentiation-associated Gene 7/IL-24 exerts cytotoxic effects by altering the alternative splicing of Bcl-x pre-mRNA via the SRC/PKC δ signaling axis. *J Biol Chem*, 2016.
4. Vu NT, Park MA, Shultz MD, Bulut GB, Ladd AC, Chalfant CE. Caspase-9b interacts directly with cIAP1 to drive agonist-independent activation of NF- κ B and lung tumorigenesis. *Cancer Research*, 2016.
5. Barbour SE, Nguyen PT, Park M, Emani B, Lei X, Kambalapalli M, Shultz JC, Wijesinghe D, Chalfant CE, Ramanadham S. Group VIA phospholipid A2 (iPLA2b) modulates Bcl-x 5'-splice site selection and suppresses anti-apoptotic Bcl-x(L) in b-cells. *J Biol Chem*, 2015.

Courses Taught

Molecular Biology of the Gene, PCB 4026/BSC 6932
 Cell Biology, PCB 3023
 Genetics, BIO201
 Introduction to Biochemistry, BIO225
 Cancer Cell Signaling, BIO401
 Immunology, BIOL455
 Biochemistry, BIOC503-504
 Biology of Cancer, BIOL450

Current Funded Grants

1. U01HD087198-01
 Eunice Kennedy Shriver National Institute of Child Health and Human Development
 Role: Co-Investigator/Biostatistician
 Period: 9/17/2015 – 8/31/2019
 The utilization of photonics technology to rapidly detect bioactive lipids associated with preeclampsia development
2. #BX001792
 Veterans' Administration Merit Review I
 Role: Significant Contributor
 Period: 10/01/2016 – 09/30/2020
 Total amount: \$150,000/year in direct costs
 The role of RNA splicing in non-small cell lung cancer
3. #IRG-17-173-22
 American Cancer Society
 Role: PI
 Period: 03/01/2019 – 02/28/2020
 Total amount: \$30,000/year in direct costs
 The role of CPEB2 alternative splicing in breast cancer metastasis

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HUZEFA DUNGRAWALA**Education**

Ph.D	Biomedical Sciences Texas Tech University Health Sciences Center Lubbock, TX	2009 - 2012
M.Sc	Biotechnology Texas Tech University Health Sciences Center Lubbock, TX	2007 - 2009
Executive Diploma	Recombinant DNA Technology Genecity Laboratories Pvt. Ltd Pune, India	2007
B.Pharm	Pharmacy Maharashtra Institute of Pharmacy Pune, India	2003 - 2007

Academic Experience

Assistant Professor (Tenure-Track)	University of South Florida CMMB Department	2018 – present
Post-doctoral Fellow	Vanderbilt University Nashville, Tennessee	2013 - 2017

Honors and Awards

2nd Place in Poster Presentation, Vanderbilt Ingram Cancer Center Retreat, 2017
 Vanderbilt Ingram Cancer Center Postdoctoral Researcher of the Year Award, 2016
 2nd Place in Poster Presentation, Vanderbilt Ingram Cancer Center Retreat, 2015
 3rd Place in the TTUHSC Annual Student Research Week Poster Competition, 2010
 The CH Foundation Scholarship, 2009

Recent Publications

1. Bass T, Luzwick J, Kavanaugh G, Carroll C, **Dungrawala H**, Glick G, Feldkamp M, Putney R, Chazin W, and Cortez D. ETAA1 acts at stalled replication forks to maintain genomic integrity. *Nature Cell Biol*, 2016
2. Smith J, Manukyan A, Hua H, **Dungrawala H**, Schneider BL. Synchronization of yeast. *Methods Mol Biol*, 2017.
3. **Dungrawala H**, Bhat K, Glick G, Le Meur R, Chazin W, Ding X, Sharan S, Zhao R, and Cortez D. RADX promotes genomic stability and modulates chemosensitivity by regulating RAD51 at replication forks. *Mol Cell*, 2017.
4. Smith JT, White JW, **Dungrawala H**, Hua H, and Schneider BL. Yeast lifespan variation correlated with cell growth and SIR2 expression. *PLoS One*, 2018.
5. Bhat KP, Krshnamoorthy A, **Dungrawala H**, Garcin EB, Modesti M, and Cortez D. RADX modulates RAD51 activity to control replication fork protection. *Cell Rep*, 2018.

Invited Talks and Meeting Attended

1. May 2013, poster presentation. Role of ISWI chromatin remodelers in DNA replication. **Dungrawala H**, Sirbu B, and Cortez D. VICC Retreat, Vanderbilt University School of Medicine, Nashville, USA
2. April 2015, poster presentation. The ATR checkpoint kinase prevents two types of fork collapse without regulating replisome stability. **Dungrawala H**, Rose K, Glick G, and Cortez D. VICC Retreat, Vanderbilt University School of Medicine, Nashville, USA.
3. August 2015, oral presentation. The replication checkpoint prevents two types of fork collapse without regulating replisome stability. **Huzefa Dungrawala**. Eukaryotic DNA replication and genome maintenance. Cold Spring Harbor Laboratory, New York, USA.
4. May 2016, poster presentation. XSSB is an alternative ssDNA binding protein that prevents replication fork collapse. Bhat K, **Dungrawala H**, Zhao R, Glick G, and Cortez D. VICC Retreat, Vanderbilt University School of Medicine, Nashville, USA.
5. February 2017, poster presentation. RADX promotes fork stability and modulates chemosensitivity by regulating RAD51. **Dungrawala H**, Bhat K, Glick G, Le Meur R, Chazin W, Ding X, Sharan S, Zhao R, and Cortez D. Keystone Symposia. Genomic Instability and DNA Repair, Santa Fe, USA.

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LIBIN YE**Education**

Ph.D	Molecular Biology Nanjing Agricultural University	2004 – 2008
B.Sc	Microbiology Zhejiang A&F University	1996 - 2000

Academic Experience

Assistant Professor (Tenure Track)	University of South Florida CMMB Department	2018-
Postdoctoral Fellow	Dept. Chemistry University of Toronto	2013-2018
Postdoctoral Fellow	Dept. of Structural Biology University of Pittsburg	2012-2013

Honors and Awards

Scholarship 1 st prize award, 1998, Zhejiang A&F Univ.	1998
Fan Quinsheng Microbiology Award, Nanjing Agricultural Univ.	2007

Recent Publications

1. Libin Ye, Ned Van Eps, Marco Zimmer, Oliver P. Ernst, R. Scott Prosser. Activation of A2A adenosine G protein-coupled receptor by conformational selection. *Nature*, 2016, 533: 265–268. (Faculty 1000 recommended: <http://f1000.com/prime/726330822?bd=1>).
2. Libin Ye, Alexander P. Oraziotti, Aditya Pandey, Scott Prosser. High-efficiency expression of yeast-derived G protein-coupled receptor and 19F labeling for dynamical studies. *Methods in Molecular Biology (Book chapter)*, 2018, 1688: 407-421.
3. Libin Ye, Chris Neale, Adnan Sljoka, Dmitry Pichugin, Nobuyuki Tsuchimura, Sacha T. Larda, Eps van Ned, Regis Pomes, Angel E. Garcia, Roger Sunahara, Oliver P. Ernst, R. Scott Prosser. Bidirectional allosteric modulation of the A2A adenosine G protein-coupled receptor by physiological cations. *Nature Communications*, 2018, 9(1):1372.
- 4.

Courses Taught

PCB 4026 – Molecular Biology of the Gene

Recent Invited Talks and Meeting Attended

1. Libin Ye. Hydrolysis elucidation for a polysaccharide by MS and NMR spectra. Sept 10th, 2012. Van Andel Institute, USA.
2. Libin Ye. Molecular and biochemical analyses of the GH44 module from CbMan5B/Cel44A (Cb1946). Oct 10th, 2012. University of Pittsburg, USA.
3. Libin Ye. Signal transduction and structural investigations revealing interaction mechanism of a novel antibody with IFN- γ receptor complex. May 13th, 2013. University of Georgia, USA.
4. Libin Ye. The model of A2A adenosine G protein-coupled receptor activation. May 12th, 2016. NMR seminar, University of Toronto, Canada.

Appendix F: Faculty CVs

JOHNNY EL-RADY**Education**

Ph.D	Biological Sciences University of Southern Mississippi Hattiesburg, Mississippi	1996
B.Sc	Biology American University of Beirut Beirut, Lebanon	1988

Academic Experience

Instructor III	University of South Florida CMMB Department	2013 – present
Instructor II	University of South Florida CMMB Department	2010 – 2012
Instructor I	University of South Florida CMMB Department	2001 – 2009
Visiting Instructor	University of South Florida Department of Biology	1997 – 2000
Visiting Assistant Professor	University of Southern Mississippi Hattiesburg, Mississippi	1996 – 1997
Teaching Assistant	University of Southern Mississippi Hattiesburg, Mississippi	1990 – 1996
Instructor	St. Joseph High School Cornet Chehwan, Lebanon	1988 – 1989

Current Membership in Professional Organizations

American Society for Microbiology (ASM)
American Association for the Advancement of Science (AAAS)

Honors and Awards

USF Kosove Society Distinguished Undergraduate Teaching and Service Award, 2018
First Recipient of the Annual STEM Institute Scholars Teaching Award, 2016
Outstanding Undergraduate Teaching Award, USF, 2013
2011 Edition of Who's Who in America
Chosen as USF's inaugural "Last Lecture" presenter, March 24th, 2010
Nominated for the 2007 and 2008 US Professor of the Year Award
Outstanding Undergraduate Teaching Award, USF, 2005
Named one of the Best Five Teachers at USF in a 2004 survey of 1,200 graduating seniors
Who's Who Among America's Teachers, 2002, 2004, 2006, and 2010
Golden Apple Award, 1999-2000, 2001-2002, and 2002-2003

Service Activities Within and Outside of Institution

CMMB, SACS Assessment Committee, 2010 – present
CMMB, Instructor Search Committee, 2017 – 2019
CMMB, Instructor III Promotion Committee, 2018 – 2019
CMMB, Faculty Advisory Committee, 2017 – 2020
CAS, Instructor Promotion Committee, 2018 – 2020
BOG Taskforce for State University System STEM Online Labs, 2016 – 2019
USF Commencement Marshals, 2005 – present
USF Textbook Affordability Project, 2012 – present
Faculty Fellow, Housing and Residential Education, 2008 – present
Member, Faculty Advisory Committee for Classroom Technology Services, 2005 – present
FCAT 2.0 Science and Biology 1 End-of-Course Assessment Expert Review Panel, Florida Department of Education, 2001 – present

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Recent Publications

1. Textbook Supplement Development
 - a. Prepared end-of chapter questions/problems for "Introduction to Genetic Principles" by David Hyde (2008), McGraw-Hill, Dubuque, Iowa
 - b. Prepared Powerpoint Lectures for the Following Textbooks
 - i. Slonczewski J and Foster J, 2017. Microbiology, 4th ed. WW Norton, New York, NY
 - ii. Lewis R, 2011, Human Genetics, 10th Edition, McGraw-Hill, Dubuque, IA
 - iii. Raven P, Johnson G et al. 2008, Biology 8th edition, McGraw-Hill, Dubuque, IA
 - iv. Johnson GB, 2006. Essentials of the Living World, 1st Ed. McGraw-Hill, Dubuque, IA
 - v. Johnson GB, 2006. The Living World, 4th Ed, McGraw-Hill, Dubuque, IA
 - vi. Brooker R, 2005. Genetics: Analysis and Principles, 2nd Ed. McGraw-Hill, Dubuque, IA
 - c. Subject Matter Expert for LearnSmart Project: McGraw-Hill, Dubuque, IA
 - d. Consultant for Biology and Genetics Animations: WH Freeman, New York, NY
 - e. Consultant for Microbiology Animations & Assessment Developer: WW Norton, New York, NY
2. Textbook Supplement:
 - a. El-Rady, J and Brooker, R. 2015. Student study guide and solutions manual for *Genetics: Analysis and Principles*. 5th Edition, McGraw-Hill Publishers, Dubuque, Iowa
3. Journals:
 - a. El-Rady J, 2006. To Click or Not to Click. Innovate – Journal of Online Innovation. Vol 2, Issue 4 (April/May 2006).
 - b. Gill G, Myerson M, and El-Rady J. 2006. Classroom response units in human sexual behavior. Informing Faculty, 1(4), 1-26
 - c. El-Rady J and Shearer G Jr. 1996. Cloning and analyses of an actin-encoding cDNA from the dimorphic pathogenic fungus *Histoplasma capsulatum*. J Med Vet Mycol. 35: 159-166.
 - d. El-Rady J and Shearer G Jr. 1996. Isolation and characterization of a calmodulin-encoding cDNA from the pathogenic fungus *Histoplasma capsulatum*. J Med Vet Mycol. 34: 163-169.

Courses Taught

General Genetics, PCB 3063 (in-class and online)
 Public Health/Pathology Microbiology, BSC 6932/BSC 4933
 Medical Mycology, BSC 4933/ BSC 6932
 Human Genetics, BSC 6932/PCB 4663

Recent Grants

1. Innovative Teaching Opportunities (iTOPP) grant; \$1,311 (Summer 2011)
2. Florida PROMISE (Partnership to Rejuvenate and Optimize Mathematics and Science Education in Florida) grant

Recent Professional Development Activities

1. Talk: Interactive Online Techniques, STEM Engaged Teaching Workshop, USF, February 2019
2. Judge: Science Fair, Wendell Krinn Technical High School, New Port Richey, Florida, November 2018
3. Talk: I'm so much cooler online: Reviewing teaching General Genetics in Various Formats over 20 years. STEMPowered Conference, University of Florida, Gainesville, October 2018.
4. Chair, Microbiology Education Session, at the Annual Meeting of the Southeastern Branch of the American Society of Microbiology, St. Petersburg, Florida, November 2017 and October 2005
5. Judge: Science Fair, Ridgewood High School, New Port Richey, Florida, December 2016
6. Talk: Poster Madness, USF's Annual Undergraduate Research Symposium, 2004 – 2011
7. Workshop: Using Clickers to Engage Students and Assess Learning, Co-Facilitator for the USF Center for 21st Century Teaching Excellence, 2006 – 2011
8. Talk: The Beauty of Biotechnology, High School Science Day, USF, March 2010
9. Talk: The Wonder of Microbiology, Honors College Experience, USF, February 2010
10. Key Note Panel Address: To Click or Not to Click, at the Symposium on 21st Century Teaching Technologies, USF, March 2005.
11. Poster: Virtual Tour of a Bacterial Cell, at the USF Symposium on Teaching Technologies, March 2005

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12. Presentation: Enhancing Teaching and Learning with Technology, at the League of Innovation Conference on Information Technology, Tampa Convention Center, November 2004.
13. Talk; Enhancing Teaching and Learning with Powerpoint, co-presented with William Patternson, For New Faculty and Graduate Teaching Assistants, USF, August 2001-2003.
14. Poster: Teaching Microbiology and Genetics Using WebCT and Powerpoint, at the Symposium on 21st Century Teaching Technologies, USF, March 2000.
15. Talk: Prokaryotic Structure and Function, for graduate and undergraduate chemistry majors enrolled in the course "Antibiotics (CHE 6938/4932), USF, September 1999.
16. Talk: Antibacterial Chemotherapy, for nurses in the Masters program enrolled in the Course "Primary Care of the Older Adult (NGR 6255)", USF, May 1999.

Appendix F: Faculty CVs

ASHOK UPADHYAYA**Education**

Ph.D	Molecular and Cell Biology The University of Texas at Dallas Dallas, Texas	2002
M.Sc	Molecular and Cell Biology The University of Texas at Dallas Dallas, Texas	1999
B.Sc	Molecular Biology The University of Texas at Austin Austin, Texas	1994

Academic Experience

Instructor III	CMMB Department University of South Florida	2019-Present
Instructor II	CMMB Department University of South Florida	2013 – 2019
Instructor I	CMMB Department University of South Florida	2006 – 2013
Visiting Instructor	CMMB Department University of South Florida	2003 – 2006
Supplemental Instructor	Brookhaven College Dallas, TX	2003
Research Assistant	University of Texas at Dallas Richardson, TX	2000 – 2002

Service Activities Within and Outside of Institution

Member, Committee to Draft Instructor Promotion Guidelines, 2018
 Chair, Instructor Promotion I to II, 2018
 Member, 25 Non-Thesis Committees
 Member, Critical Learning Improvement Committee, 2013
 CMMB, Undergraduate Program Committee, 2012 – present
 CMMB, Undergraduate Research Committee, 2009 – 2012
 CMMB, Academic Program (5-year) Review Committee, 2005
 ATLE Liaison for CMMB, 2018 – present
 Chair, Instructor Search Committee, 2018

Recent Publications

1. Yu JY, Upadhyaya AB, Atkinson NS. Tissue-specific alternative splicing of BK channel transcripts in *Drosophila*. *Genes Brain Behav.* 2006.
2. Upadhyaya AB and DeJong J. Expression of human TFIIA subunits in *Saccharomyces cerevisiae* identified regions with conserved and species-specific functions. *Biochim. Biophys. Acta*, 2003.
3. Upadhyaya AB, Khan M, Mou YC, Junker M, Gray DM, and DeJong J. The germ cell-specific transcription factor ALF: structural properties and stabilization of TBP-DNA complexes. *J. Biol. Chem.* 2002.
4. Han SY, Zhou L, Upadhyaya AB, Lee SH, Parker KL, and DeJong J. TFIIA-alpha-beta-like factor is encoded by a germ cell-specific gene whose expression is upregulated with other general transcription factors during spermatogenesis in the mouse. *Biol. Reprod.* 2001.
5. Upadhyaya AB, Lee SH, DeJong J. Identification of a general transcription factor TFIIA-alpha/beta homology selectively expressed in testis. *J. Biol. Chem.* 1999.

Courses Taught

Cellular Processes, BSC 2010
 Biology of Humans (Online), BSC 102
 Cell Biology, PCB 3023
 General Genetics, PCB 3063

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Biology of Aging, BSC 30233
Molecular Biology of the Gene, PCB 4026

Recent Professional Development Activities

1. Participant in Biology I Hackathon, ATLE, 2018
2. Participant in Lecture Assistants Conference, Miami, 2018
3. Participant in STEMPOWERED Symposium and Showcase, Gainesville, 2018
4. Participant in Summer Teaching Symposium of ATLE, Summer 2018
5. USF STEER Interdisciplinary Committee, 2017
6. Interdisciplinary STEM Retreat, 2017
7. USF STEER Interdisciplinary Committee, 2016
8. Interdisciplinary STEM Retreat, 2016
9. Completed USF Certification as an Online Educator, 2016
10. Member, STEM Faculty Learning Community, 2015 – 2016

Appendix F: Faculty CVs

BETH JONES-MASON**Education**

Ph.D	Immunology Duke University Durham, North Carolina	2009
B.Sc	Biology College of William and Mary Williamsburg, VA	2003

Academic Experience

Instructor II	University of South Florida CMMB Department	2018 – present
Instructor I	University of South Florida CMMB Department	2015 – 2018
Visiting Instructor	University of South Florida Department of Biology	2014
Instructor	Undergraduate Research Course in Pharmacology Launch into Education about Pharmacology (LEAP) Duke University	2011 – 2013
Co-Director and Instructor	Launch into Education about Pharmacology (LEAP) Duke University	2011 – 2013
Instructor	Physiology Basic Medical Sciences Immunology Unit Physician Assistant Program Duke University School of Medicine	2012, 2013
Content expert and development	Pharmacology and Immunology 2014 Creative Resolutions of Impending Situations With Intelligent Solution (CRISIS) Duke University Talent Identification Program	2013
Instructor	Summer Science Sleuths camp Duke Center for Science Education Duke University	2011
Guest Lecturer	Undergraduate Introductory Biology Davidson College	2009
Teaching Assistant	Invited through the Duke-Davidson Immun. Program George Watts Elementary School 4 th and 5 th Grade Science Durham, North Carolina	2007 – 2011 2005 – 2012
Mentor for Undergraduate Research Teaching Assistant	Duke University Principles of Immunology, IMMUNOL 244 Duke University	2005
Tutor	Biology and Chemistry College of William and Mary	2001 - 2003

Research Experience

Instructor and Teaching Lab Supervisor	Curriculum Development: Integrate Research Into Laboratory Courses University of South Florida CMMB Department	2015 – present
Postdoctoral Associate	Duke University Durham, North Carolina	2011 – 2013
Postdoctoral Associate	Duke University Durham, North Carolina	2009 – 2011
Graduate Research Assistant	Duke University Durham, North Carolina	2003 – 2009
Undergraduate Research Assistant	College of William and Mary Williamsburg, VA	1999 - 2003

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Honors and Awards

2019, Provost's Council for Teaching and Learning Excellence, University of South Florida
 2018, Outstanding Undergraduate Teaching Award, University of South Florida
 2017, USF STEER STEM Institute Scholars Teaching Award, University of South Florida Systemic Transformation through Evidence-Based Education Reform project, funded by NSF
 2017, USF STEER STEM Ed Travel Grant,
 2012, NIH Rith L. Kirschstein National Research Service Award, T32 (Pre-doctoral, Duke University)
 2008, Aegean Conferences Student Travel Award, Rhodes, Greece
 2007, Keystone Symposia Travel Scholarship, Snowbird, UT
 2007, Annual D. Bernard Amos Research Poster Competition First Place Student Award, Department of Immunology, Duke University
 2003-2006, James B Duke Fellowship, Duke University Graduate School
 2002, Summer Research Fellowship, HHMI Funded through the Undergraduate Biological Sciences Education Program of the College and William and Mary
 1999, Freshman Research Program Award, from the College of William and Mary, Undergraduate Science Education and Research Program, HHMI Funded

Service Activities Within and Outside of Institution

2019, Learning Assistant Workgroup, University of South Florida
 2019, Spring Faculty Research Showcase Participant, hosted by CMMB Department Student Council, University of South Florida
 2018 – 2019, General Education Adhoc Committee, CMMB Department, University of South Florida
 2018, CMMB Department Retreat Committee Chair, CMMB Department, University of South Florida
 2014 – 2019, Undergraduate Program Committee, CMMB Department, University of South Florida
 2014 – 2018, SACS Assessment Committee, CMMB Department, University of South Florida
 2015 – 2018, MS Non-Thesis Degree Qualifying Exam Committee Member, CMMB Department, University of South Florida
 2017 – 2019, Honors Thesis Advisor, University of South Florida
 2016 – 2018, Undergraduate Commencement Ceremony Volunteer, University of South Florida
 2015 – 2018, Undergraduate Research and Arts Colloquium Facilitator, University of South Florida

Recent Publications

1. Jones-Mason ME, Zhao X, Kappes D, Lasorella A, Iavarone A, Zhuang Y. E protein transcription factors are required for the development of CD4+ lineage T cells. *Immunity*, 2012: 36:348-61.
2. Lin YY, Jones-Mason ME, Inoue M, Lasorella A, Iavarone A, Li QJ, Shinohara ML, Zhuang Y. Transcriptional regulator Id2 is required for the CD4 T cell immune response in the development of experimental autoimmune encephalomyelitis. *J Immunol*. 2012: 189:1400-5
3. Jones ME, Kondo M, Zhuang Y. A tamoxifen inducible knock-in allele for investigation of E2A function. *BMC Dev Biol*. 2009: 9:51.
4. Yashiro-Ohtani Y, He Y, Ohtani T, Jones ME, Shestova O, Xu L, Fang TC, Chiang MY, Intlekofer AM, Blacklow SC, Zhuang Y, Pear WS. Pre-TCR signaling inactivated Notch1 transcription by antagonizing E2A. *Genes & Development*. 2009: 23:1665-76.
5. Jones ME, Zhuang Y. Acquisition of a functional T cell receptor during T lymphocyte development is enforced by HEB and E2A transcription factors. *Immunity*. 2007: 27:860-870.
6. Jones ME, Zhuang Y. Stage-specific functions of E-proteins at the b-selection and T cell receptor checkpoints during thymocyte development. *Immunol. Res*. 2011: 49:202-215.
7. Jones ME, Zhuang Y. Regulation of V(D)J recombination by E-protein transcription factors. In: Ferrion P, ed. V(D)J recombination. *Advances in Experimental Medicine and Biology*, Vol 650. Springer Science+Business Media, LLC Lanes Bioscience. 2009.
8. Lazorchak A, Jones ME, Zhuang Y. New insights into E-protein function in lymphocyte development. *Trends Immunol*. 2005: 26:334-8.

Courses Taught

Molecular Biology of the Cell, PCB 4024
 Introductory Research Experience in Molecular Biology, Combined Cell and Genetics Laboratory Course, PCB3063/L and PCB 3023/L, and IDS 4914

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Experimental Genetics and Cell Biology, Advanced Techniques, PCB 4522C/ BSC6932

Genetic Engineering, BSC 5425

Supervisor and Coordinator of upper division teaching labs: PCB 3023L, PCB 3063L, PCB 3020L

Mentor for Undergraduate Research, BSC 4910

Learning Assistant in Molecular Biology, BSC 4933

Independent Study: BSC 4905 (Cell Metabolism case study development, 2015), BSC 4905 (Molecular Biology of the Cell, Research Article analyses project, 2018),

Recent Professional Development Activities

2019, Peer Observation Program, Academy for Teaching and Learning Excellence (ATLE), University of South Florida

2018, STEM High Impact Educational Practices Workshop, University of South Florida

2017, National Center for Case Study Teaching in Science Summer Workshop at the University of Buffalo, Buffalo, NY

2014 – 2015, 2018, Summer Teaching Symposium, Academy for Teaching and Learning Excellence (ATLE), University of South Florida

2014, Faculty Learning Community, Creativity in the Classroom, Academy for Teaching and Learning Excellent (ATLE), University of South Florida

2013, Flipping your Classroom, Center for Instructional Technology Teaching IDEAS workshop, Duke University

2012, Teams for Learning at Duke, Center for Instructional Technology workshop, Duke University

2012, Future Directions of Teaching and Learning in Undergraduate Education, Center for Instructional Technology Teaching IDEAS workshop, Duke University

2011, Teaching in the Sciences: Preparing for a Career in Undergraduate Education, workshop series from the Duke Institute for Genome Sciences and Policy (IGSP) and the Office of Postdoctoral Services, Duke University

2010, Instructional Uses of Technology (GS301), Duke University

2010, Strategies to Teach Large Enrollment Class Successfully, Center for Instructional Technology Teaching IDEAS workshop, Duke University

2009, Seminar in Teaching Biology (Bio390), Duke University

Agenda Item: FL 112

USF Board of Trustees
December 3, 2019

Issue: Bachelor of Science in Information Science – CIP 11.0401

Proposed action: Approval

Executive Summary:

The Bachelor of Science in Information Science is an undergraduate STEM degree, designed to prepare graduates for high-demand, well-paying jobs in Florida and beyond. The B.S. in Information Science is derived from the field of Information Science, offering students both a societal perspective as well as technical proficiency. What distinguishes the program from other technology degrees is its focus on the intersection of people, information, and technology.

Financial Impact:

There will be no financial impact because existing faculty and resources will be reallocated for this new degree program.

Strategic Goal(s) Item Supports:

Strategic Plan Goal 1: Well-educated and highly skilled global citizens through our continuing commitment to student success.

BOT Committee Review Date: November 20, 2019

Supporting Documentation Online (please circle): Yes No

USF System or Institution specific: University of South Florida

Prepared by: Randy Borum, Ph.D., Professor; Associate Director, School of Information;
Director of Intelligence Studies

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 2020
University Submitting Proposal	Proposed Implementation Term
College of Arts & Sciences	School of Information (iSchool)
Name of College(s) or School(s)	Name of Department(s)/ Division(s)
Information Science	Bachelor of Science in Information Science
Academic Specialty or Field	Complete Name of Degree
11.0401	
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
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Signature of Chair, Board of Trustees	Date	Vice President for Academic Affairs	Date
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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	218	182	\$3,026	\$550,691	0	0	\$550,691
Year 2	237	198					
Year 3	244	203					
Year 4	267	223					
Year 5	300	250	\$2,388	\$596,934	0	0	\$596,934

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 Bachelor of Science in Information Science (BSIS) is an undergraduate STEM degree, designed to prepare graduates for high-demand, well-paying jobs in Florida and beyond. The BSIS is derived from the field of Information Science, offering students both a societal perspective as well as technical proficiency. What distinguishes the program from other technology degrees is its focus on the intersection of people, information, and technology. More specifically, the program's curriculum seeks to provide its graduates with an understanding of:

- How people interact with information and technology;
- The complexities of the information society;
- Information creation, storage, and organization applications and theories;
- Information architecture; and
- Competencies and skills required to design, implement, and evaluate new tools and approaches to solving information problems.

Concentrations will be available in five high-demand job areas:

- Data Science and Analytics, which emphasizes deep knowledge discovery through data exploration, analysis, and inference.
 - Job opportunities for these graduates include: Data Scientist, Data Analyst, Business Analyst, Advanced Analytics Professional, and Database Administrator.
- Information Security, which emphasizes cybersecurity and protecting information or data from unauthorized access, use, misuse, disclosure, destruction, modification, or disruption.
 - Job opportunities for these graduates include: Cybersecurity Analyst, Information Security Analyst, Security Architect, SOC Analyst, and Information Security Officer.
- Health Informatics, which emphasizes design, development, adoption, and application of IT-based innovations in healthcare services delivery, management, and planning.
 - Job opportunities for these graduates include: Health Informaticist, Health Information Analyst, Electronic Medical Records Administrator, Health Informatics Director, and Healthcare IT Project Manager.
- Web Development Technologies, which emphasizes full-stack (front-end and back-end) Web Development and Design.
 - Job opportunities for these graduates include: Web Developer, Full Stack Developer, UX Designer, Web Programmer, and Web Application Developer.
- Intelligence Analysis, which introduces the profession and practice of intelligence, and emphasizes analytic methods for generating actionable knowledge to inform critical decisions.
 - Job opportunities for these graduates include: Intelligence Analyst, Intelligence Specialist, Intelligence Researcher, Competitive Intelligence Analyst, and Criminal Intelligence Analyst.

These concentrations align well with articulated strategic University priority areas (particularly health and cybersecurity), the regional economy, economic development goals of the State, and broader workforce needs and opportunities.

The BSIS requires 39 credit hours in the major, and is a 120-credit hour degree program.

A recent (May 2019) external program review of the existing BSIS major and concentrations (a copy of which is included as an appendix) reported the following specific strengths:

- A focus on the intersection of people, information, and technology, infused with the values of library and information science. These values foster critical societal goals of inclusion, diversity, and equity of access, as well as a user perspective regarding the design and implementation of information technology, services, and resources;
- A highly relevant curriculum designed to meet a number of workforce needs;
- A desired program that is growing, and could grow further;
- A student body that is increasing in diversity, thus bringing much needed diversity to the information technology workforce;
- A program leadership that has brought focus and organization to the major overall, as well as concentrations;
- A flexible major that meets students “where they are” in terms of ability to enroll in courses and complete the degree;
- Faculty with relevant and appropriate skills and research areas;
- Instructional methods built on the School’s strengths in online delivery; and
- Experiential learning opportunities through internships with community partners.

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 (requesting CIP Code 11.104) was presented at the April 23, 2019 CAVP Academic Program Coordination Review Group, and no concerns were raised. After the CAVP discussion, and in the process of developing the curriculum, we came to believe that the new BSIS program more closely aligns with description for CIP Code 11.0401. On August 23, 2019, we received approval from Disraelly Cruz, BOG’s Assistant Director of Academic Affairs to pursue this new degree proposal under CIP Code 11.0401.

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.

N/A

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 BSIS program directly meets the following high-level SUS Strategic Planning goals (indicated by double checks) and indirectly meets some goals (indicated by single checks):

Statue University System Goals	Excellence	Productivity	Strategic Priorities for a Knowledge Economy
Teaching & Learning (Undergraduate)	✓✓Strengthen Quality & Reputation of Academic Programs and Universities	✓✓Increase Degree Productivity and Program Efficiency	✓✓Increase the Number of Degrees Awarded in STEM
Scholarship, Research, and Innovation	Strengthen Quality & Reputation of Scholarship, Research, and Innovation	Increase Research Activity	Increase Collaboration and

			External Support for Research Activity
Community & Business Engagement	✓Strengthen Quality & Recognition of Commitment to Business & Community	✓Increase Levels of Community & Business Engagement	✓Increase Community and Business Workforce

This degree program falls under the Programs of Strategic Emphasis in the State University System of Florida, Board of Governors 2012 - 2025 Strategic Plan in the Economic Development - STEM category (Computer Science and Technology). Specifically, the BSIS directly supports the following SUS and USF strategic planning goals:

- Increases the number of STEM graduates. The proposed B.S. in Information Science (including all five concentrations), will be offered under a federally and state designated STEM CIP Code. The structural modifications of removing one overly broad concentration option (Information Science and Technology) and replacing it with two more focused ones (Web Development Technologies and Intelligence Analysis), we will accelerate program growth (and therefore produce more STEM graduates) and better support specific STEM workforce demands at the State and National levels.
- Expands innovation and on-line education. The proposed B.S. in Information Science supports innovation by creating for USF, and in many cases for the State of Florida, some of the first undergraduate degree programs of their kind in a series of high-demand and high-paying career fields. It supports the goal of expanding online education by delivering the Information Science major (including all component concentrations) within a fully online curricular structure.
- Aligns programmatic efforts based on unique strengths and missions. USF houses Cyber Florida (formerly known as Florida Center for Cybersecurity (FC²); USF is an NSA/DHS Center of Academic Excellence for Information Assurance, Cybersecurity, and Cyber Defense Education and Research; School of Information (iSchool) teaches (and historically has taught) most USF courses directly pertinent to web development and design; USF is home to the Interdisciplinary Data Sciences Consortium (IDSC); iSchool is home to some leading, national experts in the field of Health Informatics; USF offers a Master of Science in Health Informatics;
- Expands USF's ability to develop knowledge and innovative ventures to boost production and growth in Florida's businesses and industries through collaborative research efforts, providing qualified job candidates to fill priority hiring needs in Tampa-area government organizations and businesses, and businesses along the I-4 Tech Corridor; and,
- Develops the knowledge, skills, abilities, and aptitudes of USF students to compete and succeed in our global society and marketplace.

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 B.S. in Information Science program will be included in the Science, Technology, Engineering, and Math (STEM) Strategic Emphasis category. The BSIS is currently a major offered under CIP 11.0103 (Information Technology) which is a subset of the Computer and Information Sciences and Support Services included in the STEM CIP codes approved by the Florida Board of Governors. The new CIP, reflecting the revisions and evolving strategic direction of the program is **11.0401** (Information Science/Studies), also within the STEM CIP but distinguishes the B.S. in Information Science from other programs given its areas of focus.

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.

We anticipate that the new degree program will be approved to offer for Fall, 2020. Because the Information Science major will be offered fully online, it is open to all USF undergraduate students who declare it.

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 BSIS concentration in **Data Science and Analytics** emphasizes deep knowledge discovery through data exploration, analysis, and inference.

- The Bureau of Labor Statistics' (BLS) Occupational Outlook Handbook does not yet have a specific designation for Data Scientists and Analytics Professionals, however, they do have a category for "Mathematicians and Statisticians¹." The function for that category is to "analyze data and apply mathematical and statistical techniques to help solve real-world problems in business, engineering, healthcare, or other fields." The May, 2017 (the most recent BLS date) median pay for "Mathematicians and Statisticians" (the closest to Data Science) was \$84,760 per year. The ten-year (2016-2026) job outlook projected a notable growth of 33%, which they classify as "much faster than average," because "businesses will need these workers to analyze the increasing volume of digital and electronic data." At the State level, according to the 2019-20 Florida Statewide Demand Occupations List, Database Administrators (there is no category for Data Scientists) are designated as an Enterprise Florida "targeted industry²." There 658 annual openings for Database Administrator jobs, and demand for these jobs is expected to grow at a rate of 1.65% each year. The average annual wage is \$40.74 per hour, or \$84,739 per year. Currently (August, 2019), at least 303 job openings for Data Scientists are listed specifically in the Tampa area on Indeed.com, and 297 are listed on LinkedIn.

¹ Bureau of Labor Statistics, "Mathematicians and Statisticians," Occupational Outlook Handbook, accessed October 16, 2019. <https://www.bls.gov/ooh/math/mathematicians-and-statisticians.htm>.

² Florida Department of Economic Opportunity, "Florida Statewide Demand Occupations List," accessed October 16, 2019. <http://www.floridajobs.org/workforce-statistics/publications-and-reports/labor-market-information-reports/regional-demand-occupations-list>.

The BSIS concentration in **Information Security** emphasizes cybersecurity and protecting information or data from unauthorized, access, use, misuse, disclosure, destruction, modification, or disruption.

- The Bureau of Labor Statistics' (BLS) Occupational Outlook Handbook has a designation for "Information Security Analysts³." The function for that category is to "plan and carry out security measures to protect an organization's computer networks and systems." The May, 2017 (the most recent BLS date) median pay for Information Security Analysts was \$95,510 per year. The ten-year (2016-2026) job outlook projected a growth of 28%, which they classify as "much faster than average," because "demand ... is expected to be very high, as these analysts will be needed to create innovative solutions to prevent hackers from stealing critical information or causing problems for computer networks." At the State level, according to the 2019-20 Florida Statewide Demand Occupations List, Information Security Analysts are designated as an Enterprise Florida "targeted industry⁴." There 553 annual openings for Information Security Analysts jobs, and demand for these jobs is expected to grow at a rate of 3.22% each year. The average annual wage is \$41.33 per hour, or \$85,966 per year. Currently (August, 2019), at least 507 job openings related to Information Security are listed specifically in the Tampa area on Indeed.com, and 384 are listed on LinkedIn.

The BSIS concentration in **Health Informatics** emphasizes design, development, adoption, and application of IT-based innovations in healthcare services delivery, management, and planning.

- The Bureau of Labor Statistics' (BLS) Occupational Outlook Handbook does not yet have a specific designation for Health Informaticists, however, they do have a category for "Medical Records and Health Information Technicians⁵ ." This is clearly designated as a "Technician-Level" job, typically requiring only a post-secondary certificate or an Associate's Degree. This does not accurately reflect the scope of the Health Informatics function, which aligns more closely with "Computer and Information Systems Managers⁶." According to the Bureau of Labor Statistics (BLS), the healthcare sector, and the 10-year outlook healthcare occupations predicts growth of 18%. Software developer positions in the healthcare sector (with median of \$101,790) have a projected growth rate of 31%. Statistician positions in the healthcare sector (with median of \$84,060) have a projected growth rate of 34%. According to the American Health Information Management Association (AHIMA) positions in the "Operations-Medical Records Administration" job family pay an average annual salary of \$81,950; positions in the "Clinical Documentation Improvement (CDI)" job family pay an average annual salary of \$84,300; and those in the Informatics/Data Analytics job family pay an average annual salary of \$83,490⁷. According to Indeed.com, there are currently (August, 2019) at least 230 unfilled Health Informatics jobs in Florida. Currently (August, 2019), at least 49 job openings related to Health Informatics are listed specifically in the Tampa area on Indeed.com, and 24 are listed on LinkedIn.

³ Bureau of Labor Statistics, "Information Security Analysts," Occupational Outlook Handbook, accessed October 16, 2019. <https://www.bls.gov/ooh/computer-and-information-technology/information-security-analysts.htm>.

⁴ Florida Department of Economic Opportunity, "Florida Statewide Demand Occupations List," accessed October 16, 2019. <http://www.floridajobs.org/workforce-statistics/publications-and-reports/labor-market-information-reports/regional-demand-occupations-list>.

⁵ Bureau of Labor Statistics, "Medical Records and Health Information Technicians," Occupational Outlook Handbook, accessed October 16, 2019. <https://www.bls.gov/ooh/healthcare/medical-records-and-health-information-technicians.htm>.

⁶ Bureau of Labor Statistics, "Computer and Information Systems Managers," Occupational Outlook Handbook, accessed October 16, 2019. <https://www.bls.gov/ooh/management/computer-and-information-systems-managers.htm>.

⁷ American Health Information Management Association, "US Salary Survey Report: HIM Professionals in 2019," accessed October 16, 2019. <http://bok.ahima.org/PdfView?oid=302851>.

The BSIS concentration in **Web Development Technologies** emphasizes full-stack (front-end and back-end) Web development and design.

- The Bureau of Labor Statistics (BLS) Occupational Outlook Handbook has a designation for “Web Developers⁸.” The function for that category is to “design and create websites,” including a site’s technical aspects, such as its performance and capacity.” The May, 2017 (the most recent BLS date) median pay for Web Developers was \$67,990 per year. The ten-year (2016-2026) job outlook projected a growth of 15%, which they classify as “much faster than average,” because “demand ... will be driven by the growing popularity of mobile devices and ecommerce.” At the State level, according to the 2019-20 Florida Statewide Demand Occupations List, Web Developers are designated as an Enterprise Florida “targeted industry⁹.” There 950 annual openings for Web Developer jobs, and demand for these jobs is expected to grow at a rate of 1.76% each year. The average annual wage is \$29.89 per hour, or \$62,171 per year. Currently (August, 2019), at least 382 Web Developer job openings are listed specifically in the Tampa area on Indeed.com, and 200 are listed on LinkedIn.

The BSIS concentration in **Intelligence Analysis** introduces the profession and practice of intelligence, and emphasizes analytic methods for generating actionable knowledge to inform critical decisions

- The Bureau of Labor Statistics’ (BLS) Occupational Outlook Handbook does not have a specific designation for Intelligence Analysts, however, they do have a category for “Operations Research Analysts¹⁰.” Operations Research Analysts use advanced mathematical and analytical methods to help organizations investigate complex issues, identify and solve problems, and make better decisions. Positions for Intelligence Analysts and Operations Research Analysts share many of the core Knowledge, Skills, and Abilities. The May, 2018 (the most recent BLS date) median pay for Operations Research Analysts was \$83,390 per year. This estimate lies between Career Builder’s estimate for Intelligence Analysts (\$80,000) and Indeed.com’s estimate for Business Intelligence Analysts (\$89,612). The BLS ten-year (2016-2026) job outlook projected a growth of 27% for Operations Research Analysts, which they classify as “much faster than average.” BLS assess that “as technology advances and companies seek efficiency and cost savings, demand for operations research analysis should continue to grow.” Currently (August, 2019), 11,802 U.S. job openings are listed for Intelligence Analysts on LinkedIn and 1,142 Intelligence Analyst openings are listed specifically in Florida on Indeed.com. Many occupational analysis sites use the term synonymously with Criminal Investigator or Detective, but in our view that is likely to yield inaccurate estimates. Currently (August, 2019), at least 455 Intelligence Analyst job openings are listed specifically in the Tampa area on Indeed.com, and 384 are listed on LinkedIn.

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 types of knowledge and skills gained through a B.S. in Information Science make this a high-demand career field, and one of the fastest growing. Integrated expertise in analysis, technology, domain knowledge, and leadership will make graduates attractive to government and private sector organizations.

⁸ Bureau of Labor Statistics, “Web Developers,” Occupational Outlook Handbook, accessed October 16, 2019. <https://www.bls.gov/ooh/computer-and-information-technology/web-developers.htm>.

⁹ Florida Department of Economic Opportunity, “Florida Statewide Demand Occupations List,” accessed October 16, 2019. <http://www.floridajobs.org/workforce-statistics/publications-and-reports/labor-market-information-reports/regional-demand-occupations-list>.

¹⁰ Florida Department of Economic Opportunity, “Florida Statewide Demand Occupations List,” accessed October 16, 2019. <http://www.floridajobs.org/workforce-statistics/publications-and-reports/labor-market-information-reports/regional-demand-occupations-list>.

Because there is no currently approved undergraduate program in the SUS with the 11.0401 CIP, graduate and enrollment data are not available through the Board of Governors' interactive data source. When USF proposed the newly structured BSIS major in 2016 (using CIP Code 11.0103), Information Studies had 108 declared majors. For 2018-19, the Annual Unduplicated Headcount for the BSIS major is 234. So, we have more than doubled our growth as a result of the focused, career path structure. Enrollment continues to grow across the concentrations. Moving the major from the Information Technology CIP code (11.0103) to the Information Science CIP code (11.0401) will better characterize the program's curriculum and focus.

The national projections for substantial job growth in our concentration areas and our local trends in enrollment provide evidence for current and future student demand for our BSIS 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.**

As of August 30, 2019, no other substantially similar, approved undergraduate degree programs exist in the Florida SUS, and no undergraduate program using the 11.0401 CIP Code exists in the SUS' Currently Approved Program Inventory. USF, for several years, has had a Master's program using the 11.0401 CIP Code (M.S. in Intelligence Studies). More recently, FSU changed the CIP Codes for their Information Studies Master's and Doctoral programs to 11.0401, but have no undergraduate program using the 11.0401 CIP. The University of North Florida has an undergraduate degree proposal using the 11.0401 CIP Code at some stage of development. We ran across a draft of the proposal in an Internet search, but could not find any official record of its status. Nevertheless, we reached out to Elfayoumy Sherif, the Director of UNF's School of Computing to advise him of the present proposal, to describe the differences between the programs, and to convey that our proposal should neither conflict nor compete with their proposed program. He wished us "luck in the approval process and success in the implementation." Each of us offered support for the other's efforts, and extended an offer to assist, if needed. Our email exchange with UNF is included in the Appendix C.

In the Common Prerequisites Manual for 2019-2020, the only program listed under the 11.0401 CIP Code is a B.A.S. degree at East Florida State College (none in the SUS) in Melbourne, FL. The Manual states that the common prerequisites listed under that CIP are "for Computer Information Systems EN EIF." The BSIS degree we are proposing, however, is a fundamentally different program. It is a SUS Bachelor of Science degree, not a Bachelor of Applied Science; it is an Information *Science*-focused degree, not Information *Systems*; and the two programs share **no** core courses. The EFSC program's core courses are: COM 3120 (Organizational Communication); ISM 3011 (Introduction to Information Technology Management), ISM 4300 (Information Systems Operations Management), and MAN 4504 (Operational Decision Making).

- 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 proposed Information Science (CIP 11.0401) degree program will replace the existing undergraduate major in Information Studies (CIP 11.0103 track 2/4), which currently has a student headcount of 234. Given that this proposal is primarily to offer the major under the CIP code with which it best aligns, with some minor curricular revisions, we expect just under that number of students to enroll in or change to

the new program in Year 1 (see Table 1-A). The slightly lower number of students expected (218) is in part due to curriculum changes in the concentrations and to state-mandated prerequisite courses. As reflected in Table 1-A, although there is strong industry demand, we expect growth at about 5-10% per year over the first five years. This level of growth reflects the reality that we compete with other existing and STEM-based technology-oriented degrees on campus (e.g. Information Technology, Cybersecurity, Business Analytics and Information Systems, and Computer Science). Of course, as popularity and knowledge of our program grows, so will student enrollment. Moreover, this rate of growth avoids placing undue pressure on the resources of the Department in delivering its programs.

- 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.**

Neither FAMU nor FIU offer an undergraduate program in CIP Code 11.0401.

The BSIS degree program (and the iSchool as a whole) has a student population that reflects higher percentages of traditionally underrepresented minority students. During the 2017-2018 academic year, the BSIS program was comprised of 14% Black students, 17% Hispanic, and 5% with more than one race reported. Our program is 30% female students, higher than the national average of women in computing fields where they are traditionally underrepresented.

These numbers reflect the iSchool's long-time strategic commitment to equality, diversity, and inclusion. iSchool has a Committee on Equality, Diversity, and Inclusion (EDI) that has as one of its goals broadened participation in computing and information professions. Specifically, we will build on past experience from our other programs in targeting recruitment of women and underrepresented minorities. In addition, iSchool faculty have actively sought and received federal funding to support their diversity efforts in research and teaching (e.g. we helped establish the American Library Association's Spectrum Scholarship). Also, the school has traditionally earmarked specific funds for travel and recruitment at schools that have primarily minority students and at conferences focused on diversity (e.g. the Joint Conference on Librarians of Color).

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.)**

Since this proposal is to create a program that replaces an existing one that has been in existence for a number of years, resources are already currently allotted to support the program. Appendix A, Table 4, lists the 11 faculty supporting the program, along with the percentage of effort given to the BSIS by each. Appendix A, Table 2 shows the costs of the faculty and other associated budgetary costs of the program. Faculty account for 4.20 person-years, totaling \$508,091 total in salary and benefits for Year 1. Accounting for an annual salary increase of two percent, and then adding benefits, the faculty amount (salary increase, plus fringes) will be \$549,974 by Year 5.

The A&P cost is for one third of the total effort of an Academic Services Administrator salary and benefits (\$18,600, Year 1). No advising budget is required as this is coordinated and budgeted centrally in the College of Arts and Sciences.

Given the amount of applied aspects of the curriculum, adjuncts with exceptional experience and expertise are used regularly. This is reflected in the \$24,000 in OPS (Year 1) and estimated to increase to 26,500 in Year 5.

- 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.**

There is no plan to operate this undergraduate program through continuing education or seek approval for market tuition rate.

- 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 the basic structure of the proposed BSIS degree program is already operational, we do not expect any impact to other programs. We are simply shifting the major to a new degree program.

- 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 is no increased need for general education or other prerequisite courses for this new degree program.

- 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.**

As previously described, the current major is supported fully with existing operational funds. In the past, however, we have benefited from Board of Governor's special funding, Project TEAm, which was meant to help increase the number of computing- and information technology-focused programs. USF's effort involved Computer Science, Information Technology, Information Studies, and Management Information Systems, and involved a collaboration with UCF and FIU that resulted in shared courses, workshops, and advising. This kind of collaboration with other institutions is a model we will look at as similar funding opportunities make themselves available.

We have also been successful in securing federal funding via the National Security Agency for our graduate programs in Intelligence Studies and Cybersecurity. These provide training and professional opportunities for select students and some capacity building resources, as well. Our experience with these types of funding opportunities will be useful as we explore other opportunities.

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 B.S. in Information Science is designed to benefit the University, Tampa Bay Region, and Florida’s burgeoning knowledge economy. Key features of the program and its curriculum supporting this include:

Critical Workforce Development. The B.S. in Information Science, offered under a federally and state designated STEM CIP Code, is built on an analytic and human-centered information science framework. There is an increasing need for professionals who not only possess solid technical skills in programming, databases, and information management, but who have concomitant analytic and critical thinking ability to make use of technology in a way that benefits decision-makers, organizations, and society as a whole. This has always distinguished information science from other related disciplines and is provided as a clear alternative for USF students. These new professionals will be ready for well-paying jobs in a variety of sectors across Tampa Bay, the I-4 Technology Corridor, across Florida and nationally.

Pathways for Graduate Education. Graduates from the B.S. in Information Science will be better prepared than many other technology-based degree programs to enter into the increasing array of relevant graduate programs. Within the iSchool are two graduate degrees that are particularly well-suited for graduates of the B.S. in Information Science. The M.S. in Intelligence Studies is STEM-based and is ideal for BSIS students seeking careers as “next generation” intelligence analysts or strategists. The M.A. in Library and Information Science has been ALA-accredited since 1974. LIS is an evolving field, but students in our BSIS have a unique understanding of information storage and retrieval, metadata, data archiving and management, and other areas, and also possess technical skills that are in high demand in libraries and information agencies of all kinds. Also, graduates from the BSIS program make excellent students in the USF-wide M.S. in Cybersecurity program given their technical and analytic skills. These are but a few examples of the kinds of interdisciplinary programs well within reach of our talented students.

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 to earn a BSIS degree is 120.

- 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.

As of August 30, 2019, no undergraduate program using the 11.0401 CIP Code existed in the SUS' Currently Approved Program Inventory, although USF, for several years, has had a Master's program using the 11.0401 CIP Code (M.S. in Intelligence Studies). In the Common Prerequisites Manual for 2019-2020, the only program listed under the 11.0401 CIP Code is a B.A.S. degree at East Florida State College (none in the SUS) in Melbourne, FL. The Manual states that the common prerequisites listed under that CIP are “for Computer Information Systems EN EIF.” The BSIS degree we are proposing, however, is a fundamentally different program. It is a SUS Bachelor of Science degree, not a Bachelor of Applied Science, and the two programs share **no** core courses.

The EFSC program's core courses are: COM 3120 (Organizational Communication); ISM 3011 (Introduction to Information Technology Management), ISM 4300 (Information Systems Operations Management), and MAN 4504 (Operational Decision Making).

The core courses for the proposed BSIS program are: LIS 3261 (Introduction to Information Science); LIS 3353 (IT Concepts for Information Professionals); LIS 4414 (Information Policy and Ethics); LIS 4204 (Information Behaviors); ENC 3249 (Communication for Information Professionals) (WRIN); LIS 4934 (Senior Capstone for Information Professionals).

Information Science and Information Systems are complementary, but distinct disciplines that share a superficial-level interest in information-related subject matter. A number of scholars have compared and contrasted the two disciplines (Beeson & Chelin, 2006; Monarch, 2000; Ellis, Allen, & Wilson, 1999). Their analyses differ a bit in *how* they characterize the differences, but are unanimous in the conclusion that the disciplines are distinct. Monarch (2000)¹¹, for example, concluded that:

Information Science research tends to be concerned with the information content of systems and with the development of more effective information services, while Information Systems research is more concerned with formal organisational relationships to data and the development of more efficient computer-based systems.

Beeson and Chelin (2006)¹² describe the disciplinary foci slightly different, stating that “the primary object of interest in Information Systems is not information itself but rather how information systems can be

¹¹ Monarch, I.A. (2000). Information Science and Information Systems: Converging or Diverging? *Proceedings of the 28th Annual Conference of the Canadian Association for Information Science (CAIS/ACSI)*. Retrieved September 2, 2019 from:

<http://citeseerx.ist.psu.edu/viewdoc/download?doi=10.1.1.458.5236&rep=rep1&type=pdf>

¹² Beeson, I., & Chelin, J. (2006). Information systems meets information science. *Innovation in Teaching and Learning in Information and Computer Sciences*, 5(2), 1-6.

used to accomplish some further objective” (p. 2). Overall, Ellis and colleagues (1999)¹³ describe Information Science and Information Systems as “conjunct subjects,” but “distinct disciplines.”

While the name and content of the EFSC program reflect its curricular focus on Information *Systems*, our proposed BSIS program is clearly grounded in the discipline of Information *Science*. The proposed B.S. in Information Science focuses primarily on information itself, and secondarily on the systems, aligning directly with the official description for the 11.401 Information Science CIP Code:

Information Science/Studies. A program that focuses on the theory, organization, and process of information collection, transmission, and utilization in traditional and electronic forms. Includes instruction in information classification and organization; information storage and processing; transmission, transfer, and signaling; communications and networking; systems planning and design; human interfacing and use analysis; database development; information policy analysis; and related aspects of hardware, software, economics, social factors, and capacity.

Accordingly, we outline below our proposed Common Prerequisites for an undergraduate degree, with a specific disciplinary focus in Information Science. Since there is an existing track--EFSC’s program B.A.S. using the 11.401 CIP (under Track 1) – we respectfully request a second track, as described below, that properly prepares students for USF’s BSIS major.

To deliver a degree program built on an information science foundation, the USF B.S. in Information Science will require students to complete the following five common prerequisites, each with a minimum grade of C:

- STA X023 Introductory Statistics I or STA X122 Statistics (3 Credits)
- MAC XXXX or MAD XXXX Any Pre-Calculus or Discrete Math course (3-4 Credits)

The above two courses establish the quantitative foundations skills that are necessary for analyzing problems in Information Science.

- COP XXXX (6 Credits) – Programming Requirement^(a)
 - COP XXXX Any programming concepts or introductory programming course (3 cr. hrs.)
 - COP XXXX Any object-oriented computer programming course (3 cr. hrs.)
- COP XXXX or CGS XXXX or LIS XXXX (3 Credits) Any database course

^(a)Programming Requirement: Introductory and additional programming courses should cover C, C++, JAVA, Python, R, or equivalent language.

The above three courses establish the basic programming skills that are necessary for solving problems in Information Science.

At USF these five prerequisite courses will be covered by the following courses:

USF Course	Common Prerequisite
STA 2023 Introduction to Statistics	STA X023 Introductory Statistics I or STA X122 Statistics
MAD 2104 Discrete Math	MAC XXXX or MAD XXXX Any Pre-Calculus or Discrete Math course
COP 2030 Programming Concepts	COP XXXX Any Programming Concepts or Introductory Programming course

¹³ Ellis, D., Allen, D., & Wilson, T. (1999). Information science and information systems: Conjunct Subjects Disjunct Disciplines. *Journal of the American Society for Information Science*, 50(12), 1095-1107.

COP 2250 Object-Oriented Programming (JAVA SE)	COP XXXX Any Object-Oriented Computer Programming course
LIS 2780 Database Concepts	COP XXXX or CGS XXXX or LIS XXXX Any Database Course

During AY 2019-2020, USF will submit a Common Prerequisite Application form on behalf of the proposed Information Science degree program in CIP 11.0401.

- 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 the 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.**

The proposed 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 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.

The University of South Florida’s mission is to deliver competitive undergraduate, graduate, and professional programs to generate knowledge, foster intellectual development, and ensure student success in a global environment.

The iSchool and the College of Arts & Sciences (CAS) strive for excellence in teaching, research, and public service. The purpose for establishing the BSIS is wholly consistent with the missions of the SUS, USF, and CAS.

This degree program falls under the Programs of Strategic Emphasis in the State University System of Florida, Board of Governors 2012 – 2025 Strategic Plan in the Economic Development – STEM category (Computer Science and Technology). Specifically, the BSIS directly supports the following SUS and USF strategic planning goals:

- Increases the number of STEM graduates. The proposed B.S. in Information Science, will be offered under a federally and state designated STEM CIP Code. The focused concentrations will

accelerate program growth (and therefore produce more STEM graduates) and better support specific STEM workforce demands at the state and national levels.

- Expands innovation and on-line education. The proposed B.S. in Information Science supports innovation by creating for USF, and in many cases for the State of Florida, some of the first undergraduate degree programs of their kind in a series of high-demand and high-paying career fields. It supports the goal of expanding online education by delivering the Information Science major within a fully online curricular structure.
- Aligns programmatic efforts based on unique strengths and missions. USF houses Cyber Florida (formerly known as Florida Center for Cybersecurity (FC²); USF is an NSA/DHS Center of Academic Excellence for Information Assurance, Cybersecurity, and Cyber Defense Education and Research; School of Information (iSchool) teaches (and historically has taught) most USF courses directly pertinent to web development and design; USF is home to the Interdisciplinary Data Sciences Consortium (IDSC); iSchool is home to some leading, national experts in the field of Health Informatics; USF offers a Master of Science in Health Informatics;
- Expands USF's ability to develop knowledge and innovative ventures to boost production and growth in Florida's businesses and industries through collaborative research efforts, providing qualified job candidates to fill priority hiring needs in Tampa-area government organizations and businesses, and businesses along the I-4 Tech Corridor; and,
- Develops the knowledge, skills, abilities, and aptitudes of USF students to compete and succeed in our knowledge-driven global society and marketplace.

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 B.S. in Information Science is designed to utilize the expertise of the iSchool faculty in strategically important areas (Information Security, Data Science and Analytics, Health Informatics, Web Development Technologies, and Intelligence Analysis), all on a solid, theoretical foundation of information science. The program includes teaching expertise from outstanding adjunct faculty from relevant professions and is interdisciplinary in its scope and outcomes.

The program, as previously noted, provides an excellent foundation for further education in information and technology-focused graduate programs. As just a few examples, our students are exceptionally prepared for matriculation to the USF-wide M.S. in Cybersecurity, and either of the School's two master's programs (Library and Information Science or Intelligence Studies).

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 new program is being proposed under a new CIP (11.0401) as a replacement for the current major. The current major also evolved from a traditional Information Technology major to one that integrates much more Information Science methods, knowledge, and skills; namely, an overall focus on the interactions among people, information, and technology.

The below table describes key events and decision-making points across the life of the major to the point of the current proposal. The evolution alluded to above is reflected through this process and includes the recognition of new industry and disciplinary demands and expectations (e.g., that were addressed in part through new concentrations). The date, stakeholders participating, and activities are briefly outlined below:

Planning and Implementation Process

Date	Participants	Planning Activity
Fall 2010	iSchool Faculty; USF Senior Administration; USF- Sarasota-Manatee Faculty	BSIT program (with CIP 11.103-Track II) moved from USF-Lakeland to USF-Tampa.
Fall 2010	iSchool Faculty	BSIT program re-named as a Bachelor of Science in Information Studies (retained CIP 11.103-Track II)
Fall 2010-Fall 2015	iSchool Faculty	BSIS program operational. No concentrations. Remained relatively small.
Fall 2015	iSchool Director, Associate Director, Undergraduate Director, iSchool Faculty, Office of Undergraduate Studies	Developed comprehensive re-structuring of the BSIS program, providing concentration to align with specific pathways for high-demand, high-paying jobs: Data Science, Information Security, Health Informatics, Web Development Technologies.
Fall 2015	iSchool Faculty	Voted to approve the proposed re-structuring.
Fall 2015	iSchool Director, Associate Director	Submitted formal change of program proposal to restructure the BSIS program. Developed and submitted proposals for the 15 new constituent courses necessary to implement the newly structured BSIS.
Fall 2015	iSchool Director, Associate Director	Proposals for re-structured program and new concentration courses approved by the USF Undergraduate Council.
March 2016	iSchool Director, Associate Director	USF iSchool accepted as member of the iSchool's organization.
Fall 2016	iSchool Director, Associate Director, iSchool Faculty,	Newly structured BSIS program launched. Existing students were advised on options for program completion. Recruitment of new students for the BSIS program began.
Fall 2016-Spring 2019	iSchool Faculty	Newly structured BSIS program operational. Number of students enrolled in the major more than doubled in two years.
Spring 2019	Florida State Legislature	Senate Bill 4, led by Senator Bill Galvano was signed into law by Governor Rick Scott on Sunday, March 11th. This bill establishes the "Florida Excellence in

		Higher Education Act of 2018,” which contains a provision requiring the USF System – composed of the University of South Florida Tampa, the USF St. Petersburg and the USF Sarasota-Manatee – to consolidate their separate institutional accreditations under one umbrella.
Spring 2019	USF Senior Leadership, Office of Decision Support, and Faculty	USF System engages in a planning process to implement the Florida Excellence in Higher Education Act of 2018. Part of that process involves de-conflicting CIP codes and programs across the three institutions, and between its component Colleges.
Spring 2019	USF Senior Leadership, Office of Decision Support, College of Arts & Sciences Dean’s Office	A decision is made, consistent with USF’s consolidation plan, that the BSIS’s existing CIP code (11.0103) should be changed to better facilitate the objectives of consolidation because the CIP Code CIP was being used in two different Colleges within USF-Tampa.
April, 2019	iSchool Director, Associate Director, Office of Decision Support	Developed and submitted Pre-Proposal to the Council of Academic Vice Presidents (CAVP) Academic Program Coordination Review Group.
April 23, 2019	CAVP Work Group Members	CAVP Work Group expressed no concerns with the pre-proposal.
May 14, 2019	Board of Trustee’s Academics and Campus Environment Committee	Approved the Accountability Plan
June 6, 2019	Board of Trustees	Approved the Accountability Plan
June 11, 2019	Board of Governors	Approved USF’s Accountability Plan
August, 2019	College of Arts & Sciences: Sr. Assoc. Dean, iSchool Director, and iSchool Associate Director; ODS: Associate Director and Vice Provost	Decision to change the BSIS CIP code to 11.0401 (Information Science/Studies) is conveyed to iSchool management team.

Events Leading to Implementation

Date	Implementation Activity
August, 2019	CAS approves new degree proposal.
September 23, 2019	Undergraduate Council approves new degree proposal.
October 17, 2019	Academic Program Advisory Council approves new degree proposal.
November 20, 2019	BOT ACE Committee approves new degree proposal.
December 3, 2019	BOT approves new degree proposal.

December, 2019	Proposal sent to the BOG Staff for review and addition to the Academic Program Inventory.
January-July 2020	Once approved, we will add it to the USF Catalog, market the program, and recruit students.

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.

In early 2019, the Office of Institutional Effectiveness in the Office of Decision Support enlisted Dr. John Bertot, Associate Provost for Faculty Affairs and Professor in the College of Information Studies at the University of Maryland College Park, to lead a comprehensive review of the existing BSIS major (BSIS, CIP 11.0103).

The on-site review occurred March 18-20, 2019, during which time the evaluator met with and interviewed 22 faculty, administrators, and staff, as well as eight students enrolled in the BSIS major. Prior to the on-site visit, the evaluator was provided with multiple documents to review, including a self-study and a report from the College of Arts & Sciences’ Dean’s Office.

The following is a summary of the conclusions and recommendations excerpted directly from that report, annotated with the progress we have made since May, 2019 in implementing its recommendations. A full copy of the report is included as an Appendix C.

Curriculum

A review of selected course syllabi, course descriptions, and concentration goals revealed course and degree content that is current and timely, providing students with requisite “hands-on” skills (such as an understanding of data, the use of R for analytics, client/consulting experiences with local organizations, and more) as well as experiential learning opportunities. Such an approach offers student a well-implemented blend of conceptual, applied, and contextual skills that both enhance learning and emphasize actual implementations of various technologies, resources, and services.

Faculty

The faculty with whom the evaluator met, along with a review of their qualifications and materials, demonstrate a faculty with appropriate subject matter expertise; applied technical and data skills; enthusiasm; connections to key employment communities (e.g., security, cybersecurity, data); and levels of engagement with students and others that provide an overall positive experience for students. Indeed, the evaluator met with students at different points in their degree completion (some near completion, others towards the beginning of their programs of study), and all praised the quality of instruction, the dedication of the faculty, the support provided them, and program’s flexibility.

Students

The BSIS major continues to grow. It has grown to a reported 234 head count from 165, representing an overall growth of 42% in the number of majors between AY2013-2014 and AY2017-2018.¹⁴

The program exhibits a number of positive attributes regarding students. These include:

- An overall positive growth trajectory that has not yet reached saturation.
- A student body growing in diversity. The number of students of color continues to increase, as does the number of women in the program.
- The number of degrees awarded is growing.
- The time to degree completion is decreasing.

Data provided to the external reviewer by CAS and the iSchool indicate the student employment placement rate is high (70-75%) with average salaries of \$45,000/year - figures that compare favorably to other SUS universities. The 2016 revisions to the BSIS program (addition of concentrations) will likely strengthen these numbers given the refocusing of the degree program.

Recommendations

The external evaluator found that the BSIS major is increasingly embraced by the iSchool. The faculty and leadership, especially since 2016, have created a program this is well designed, aligned with University and workforce priorities and needs, strategic in leveraging its location (particularly with the health information and cybersecurity emphases), and poised for growth. Further, the existing and recently hired faculty with primary association with the program, are well suited to its curriculum, innovative in their instructional approaches, and dedicated to the program's continued and future success.

The evaluator makes the following recommendations based on the above articulated findings:

- The School needs to ensure that there is a fully developed, ongoing review and revision process for individual courses, concentrations, and other curriculum matters.
- The School should develop metrics for determining the success of the program, for example, whether concentrations should be expanded or discontinued, and whether the School has the capacity to maintain them.
- The School should further explore ways in which to create more cohesion amongst the faculty with instructional responsibilities in the BSIS major to ensure common purpose and engagement.
- The School should develop and implement a more centralized process and effort to secure internship opportunities and partnerships - which can also benefit faculty research activities.
- The School should conduct an assessment of its revised outcomes assessment methodology and process during summer 2019. Given the newness of the process implemented, it was not possible to fully assess the veracity of the student learning outcomes process and little data were available to review prior to or during the site visit.
- The College and School should work collaboratively to determine an appropriate size of the BSIS program, and ensure that the School receives the faculty lines, infrastructure, and staffing resources to successfully meet the determined student enrollment target. Without such an investment, the BSIS program will not be able to sustain growth beyond the current projections without compromising program quality and an overall positive student experience.

¹⁴ The evaluator notes that there are different numbers of majors presented in the various documents shared as part of the review. The calculations presented are taken from the Number of Majors table in the *Undergraduate Program Self-Study*, p. 7.

- The College and School should work collaboratively to develop support structures for enhancing and supporting research expectations for faculty. Tenured/tenure track faculty hired within the last several years are well positioned in critical areas of health information, cybersecurity, data science and analytics, and information science. Their research profiles are those of high-quality scholars in their respective fields.

The above recommendations are not exhaustive, but rather designed to highlight key findings and observations from the review.

Progress

The external review report was submitted just three months ago (and right before the summer session), so the iSchool faculty and management team are still in a planning phase for responding to many of the evaluator's recommendations. Below is a summary of our collective progress and ongoing efforts with a specific focus on the BSIS degree program and curricular efforts:

- Program Review & Revision Process: The iSchool Director appointed a new Director of Undergraduate Studies, with appropriate allocation of faculty duties, to lead the School's response to the report's recommendations, to ensure BSIS student success, and to advance the needs and interests of the BSIS program. For the present proposal, the faculty and management team, including the Undergraduate Director, considered the report's recommendations concerning program/course review and adjusted the curriculum, as outlined in this document, including:
 - The elimination of a more general program concentration
 - The addition of a concentration in a high-demand career field (Web Development Technologies) for which many BSIS students have expressed a demand, and which the iSchool has an existing infrastructure to support.
 - A re-structuring of the common prerequisite courses, which USF is requesting because the proposed BSIS is the first undergraduate program in the Florida SUS to use the 11.0401 CIP Code.
 - A comprehensive assessment of enrollment (including need and demand) across all BSIS concentrations (a) to ensure the School has sufficient resources to sustain them, and (b) to develop a plan for growth with specific target metrics.
- Planning & Resources: After the BSIS re-design, but before the recent external review, the iSchool carefully crafted a detailed, five-year strategic plan, which it presented to the CAS Dean and Senior Staff. According to the report, the BSIS program has a clear vision and well-developed curriculum that aligns with workforce needs. Program growth beyond current projections are likely to require additional resources. The iSchool continues to work with the CAS Dean's Office to discuss resources and their implications for planned program growth.
- Outcomes Assessment: As part of the process for developing this proposal, the iSchool faculty and management team closely examined the revised BSIS outcomes assessment methodology and process. We have appointed an Assessment Coordinator from the faculty to help monitor and address data collection and analysis for outcomes assessments across concentrations. Effectively measuring outcomes in any diverse academic program like the BSIS is, and should be, an ongoing effort.
- Faculty Cohesion: The present proposal created an opportunity for the iSchool faculty to collectively review and provide input on all aspects of the BSIS program, and for all faculty – across programs and BSIS concentrations-- to influence and share information on program-level and concentration-level objectives. These efforts should facilitate a clearer sense of common purpose and engagement.
- Internship & Partnerships: The program review recommended that the iSchool develop and implement a more centralized process and effort to secure internship opportunities and partnerships. Our newly appointed Director of Undergraduate Studies, will lead the

effort to structure and grow the array of experiential learning opportunities available to BSIS students. He has already met with potential internal and external partners to initiate that process.

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.**

Please see Appendix D for the Academic Learning Compact.

Academic Learning Compacts, or ALCs, identify the core content/discipline knowledge and skills, communication skills, and critical thinking skills students will acquire upon successfully completing the program.

Department/Program: School of Information

Major: Information Science

Degree Designation: Bachelor of Science

The B.S. in Information Science degree is an interdisciplinary program designed to provide students with a strong theoretical foundation in information science and discipline-specific technical skills that prepare them for success information-related professions. The program's primary focus is on people, information, and technology, and the interactions between them.

Content/Discipline Knowledge & Skills

- Students will describe and apply how people interact with information and technology; the complexities of the information society; knowledge of information creation, storage, and organization applications and theories; information architecture; and related knowledge and skills needed to design, implement, and evaluate new tools and approaches to solving emerging information problems. The areas of focus are dependent upon the students' chosen concentration and each of the concentrations will be assessed for outcomes in their individual area.
 - Information Security - Students will describe and apply the underlying principles, methodologies, and applications for protecting information or data from unauthorized access, use, misuse, disclosure, destruction, modification, or disruption.
 - Data Science - Students will describe and apply the underlying principles, methodologies, and applications for knowledge discovery through data exploration, analysis, and inference.
 - Health Informatics - Students will describe and apply information science principles to the design, development, adoption, and application of IT-based innovations in healthcare services delivery, management, and planning.
 - Web Development Technologies - Students will describe and apply appropriate technologies to create, maintain, and improve functional websites to meet client requirements and users' needs.
 - Intelligence Analysis - Students will describe the structure and function of the U.S. Intelligence Community, explain its core analytic disciplines, and apply analytic methodologies to generate actionable knowledge for critical decisions.
- Students will be able to recognize professional responsibilities and make informed judgements based on legal and ethical principles in information-related professional matters.

Critical Thinking Skills

- Students will be able to analyze a complex, information-related problem, and apply principles of information science and other relevant disciplines to identify, design, implement, and evaluate solutions.

Communication Skills

- Students will be able to communicate effectively in a variety of professional contexts with respect to Information Science-related content.

Assessment of Student Learning Outcome

Through a variety of mechanisms including core task assessments, examinations, assignments, and capstone experiences School of Information program faculty will measure students' achievement of the identified core learning outcomes. The results of the assessments will be used to improve student achievement and program effectiveness.

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

Students applying to the University of South Florida are expected to meet the University's admissions standards, as listed on USF's Office of Admissions' website (<https://www.usf.edu/admissions/>). (URL added 9/2/2019)

For graduation, students must satisfy the requirements from their catalog year while maintaining GPA and grading requirements, and satisfactory completion of the following requirements:

- General Education Program (36 credit hours), including State Core General Education, State Computation and Communication;
- Minimum of 120 unduplicated credit hours;
- A minimum adjusted grade point average (GPA) of 2.0 on all coursework taken at USF and an overall 2.0 GPA average on all college-level coursework;
- Major and college requirements in a chosen degree program;
- Nine credit hours of coursework taken during the summer term(s) (if entered USF with less than 60 credit hours);
- Registration and successful completion of at least thirty (30) of the last sixty (60) credit hours;
- 42 credit hours of upper-level coursework;
- Civics Literacy;
- Foreign language admissions coursework;
- Specific Grading Requirement: Unless otherwise stated, the minimum acceptable grade in all BSIS required courses, including the prerequisite math, statistics, and programming courses, is a C or higher (C- is insufficient).
- Each College of Arts and Sciences student is required to complete an application for graduation and graduation checklist.

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 BSIS curriculum focuses on information and information systems from a human/user-centered perspective and studies the structure, behavior and interactions of both how people seek and use information, and of natural and artificial systems that store, process and communicate information. The BSIS aligns with high-demand, high-paying jobs through five curricular concentration areas.

The BSIS degree program requires a total of 120 semester credit hours of coursework. The lower-level portion of the degree program includes course prerequisites and general education courses. The major portion of the degree program includes 39 hours in the Information Science major, to include 18 credit hours of required major core courses, and 21 credit hours of concentration core and elective courses. All major core and concentration courses are offered for three (3) Credit Hours, unless otherwise noted.

Major requirements for the BSIS Degree:

Major Core (18 credit hours)

- LIS 3261 Introduction to Information Science
- LIS 3353 IT Concepts for Information Professionals
- LIS 4414 Information Policy and Ethics
- LIS 4204 Information Behaviors
- ENC 3249 Communication for IT Professionals
- LIS 4934 Senior Capstone for Information Professionals

Concentration Core and Electives (21 credit hours)

Students must choose one of the five 21-hour concentrations: Information Security, Health Informatics Data Science and Analytics, Web Development Technologies or Information Science and Technology.

Information Security Concentration (21 hours)

Area of emphasis: cybersecurity and protecting information or data from unauthorized access, use, misuse, disclosure, destruction, modification, or disruption.

Concentration Core (18 credit hours):

The following courses are required for the concentration:

CIS 3360 Principles of Information Security

CIS 3367 Architecting Operating System Security

CIS 4204 Ethical Hacking OR CIS 4216 Aggressive Hacking – What Hackers Do

CIS 4361 Information Assurance and Security Management for IT

CIS 4365 Computer Security Policies and Disaster Preparedness

LIS 4482 Networks and Communication

Concentration Elective (3 credit hours):

Student choose three credit hours of electives from the following list:

IDS 4942 Community Internship

CIS 4203 Cyber Forensics & Investigations

CNT 4403 Network Security & Firewalls

CAP 4790 Data & Security Analytics

CIS 3362 Cryptography and Information Security

CIS 3615 Secure Software Development

CIS 4216 Aggressive Hacking: What Hackers Do

LIS 2005 Information Literacy

LIS 3352 Interaction Design

LIS 3361 World Wide Web Page Design and Management

LIS 3783 Information Architecture

LIS 4029 Professional & Technical Comm. for Analysts

LIS 4365 Web Design Technologies

LIS 4477 Clinical Decision Support

LIS 4776 Health Information Technology

LIS 4779 Health Information Security

LIS 4788 Management of Health Information Technology

LIS 4785 Introduction to Health Informatics

LIS 4800 Introduction to Data Science

LIS 4273 Advanced Statistics and Analytics
LIS 4317 Introduction to Visual Analytics
LIS 4761 Introduction to Data & Text Mining
LIS 4370 R Programming for Data Science
LIS 4805 Predictive Analytics
LIS 4930 Selected Topics in Information Studies (Topic must be approved by the advisor or program director)
Additional course options may be approved by the advisor or program director.

Health Informatics Concentration (21 credit hours)

Areas of emphasis: design, development, adoption, and application of IT-based innovations in healthcare services delivery, management, and planning.

Concentration Core (18 credit hours):

The following courses are required for the concentration:
LIS 4482 Networks and Communication
LIS 4477 Clinical Decision Support
LIS 4776 Health Information Technology
LIS 4779 Health Information Security
LIS 4788 Management of Health Information Technology
LIS 4785 Introduction to Health Informatics

Concentration Elective (3 credit hours):

Student choose three credit hours of electives from the following list:

IDS 4942 Community Internship
LIS 2005 Library and Internet Research Skills
LIS 3352 Interaction Design
LIS 3361 World Wide Web Page Design and Management
LIS 3783 Information Architecture
LIS 4029 Professional & Technical Comm. for Analysts
LIS 4365 Web Design Technologies
LIS 4800 Introduction to Data Science
LIS 4273 Advanced Statistics and Analytics
LIS 4317 Introduction to Visual Analytics
LIS 4761 Introduction to Data & Text Mining
LIS 4370 R Programming for Data Science
LIS 4805 Predictive Analytics
LIS 4930 Selected Topics in Information Studies (Topic must be approved by the advisor or program director)
Additional course options may be approved by the advisor or program director.

Data Science and Analytics Concentration (21 credit hours)

Area of emphasis: deep knowledge discovery through data exploration, analysis, and inference.

Concentration Core (18 credit hours):

The following courses are required for the concentration:
LIS 4800 Introduction to Data Science
LIS 4273 Advanced Statistics and Analytics
LIS 4317 Introduction to Visual Analytics
LIS 4671 Introduction to Data & Text Mining
LIS 4370 R Programming for Data Science
LIS 4805 Predictive Analytics

Concentration Elective (3 credit hours):

Student choose three credit hours of electives from the following list:

IDS 4942 Community Internship
 LIS 2005 Library and Internet Research Skills
 LIS 3352 Interaction Design
 LIS 3361 World Wide Web Page Design and Management
 LIS 3783 Information Architecture
 LIS 4029 Professional & Technical Comm. for Analysts
 LIS 4365 Web Design Technologies
 LIS 4482 Networks and Communication
 LIS 4477 Clinical Decision Support
 LIS 4776 Health Information Technology
 LIS 4779 Health Information Security
 LIS 4788 Management of Health Information Technology
 LIS 4785 Introduction to Health Informatics
 LIS 4930 Selected Topics in Information Studies (Topic must be approved by the advisor or program director)
 Additional course options may be approved by the advisor or program director.

Web Development Technologies Concentration (21 hours)

Area of emphasis: full-stack (front-end and back-end) Web Development and Design.

Concentration Core (18 credit hours):

The following courses are required for the concentration:

LIS 3361 WWW Page Design/Management
 LIS 4365 Web Design Technologies
 LIS 4482 Networks and Communication
 LIS 3352 Interaction Design
 LIS 3783 Information Architecture
 CIS 3360 Principles of Information Security

Concentration Elective (3 credit hours):

Student choose three credit hours of electives from the following list:

IDS 4942 Community Internship
 LIS 2005 Library and Internet Research Skills
 LIS 4029 Professional & Technical Comm. for Analysts
 CEN 3722 Human Computer Interfaces for IT
 CGS 3853 Web Systems for IT
 CIS 4361 Information Assurance and Security Management for IT
 CIS 4365 Computer Security Policies and Disaster Preparedness
 LIS 4477 Clinical Decision Support
 LIS 4776 Health Information Technology
 LIS 4779 Health Information Security
 LIS 4788 Management of Health Information Technology
 LIS 4785 Introduction to Health Informatics
 LIS 4930 Selected Topics in Information Studies (Topic must be approved by the advisor or program director)
 Additional course options may be approved by the advisor or program director.

Intelligence Analysis Concentration (21 credit hours)

Area of emphasis: profession and practice of intelligence, emphasizing analytic methods for generating actionable knowledge to inform critical decisions

Concentration Core (15 credit hours):

The following courses are required for the concentration:

LIS 4671 Introduction to Intelligence Studies
 LIS 4672 Critical Thinking and Methods for Intelligence Analysis
 LIS 4673 Open Source Intelligence
 LIS 4029 Professional and Technical Communication for Analysts
 LIS 4800 Introduction to Data Science

Concentration Electives (6 credit hours):

Some elective courses from outside the iSchool are only offered face-to-face, rather than online. There are a sufficient number of online electives, however, to meet the needs of students who do not wish to take on-campus courses.

For the concentration electives, students in the Intelligence Analysis concentration may choose six credit hours of electives from the following list:

IDS 4942 Community Internship
 LIS 3783 Information Architecture
 LIS 4273 Advanced Statistics and Analytics
 LIS 4671 Introduction to Data & Text Mining
 LIS 4370 R Programming for Data Science
 LIS 4762 Geographic Information Systems for Data Science
 LIS 4482 Networks and Communication
 LIS 4930 Selected Topics in Information Studies (Topic must be approved by the Advisor or Program Director)
 ANT 4352 Peoples of Africa
 ANT 2410 Cultural Anthropology
 ANT 4243 Middle East and North Africa
 ASH 3404 Modern China
 ASN 3014 China Today
 ASN 3030 The Middle East
 CIS 3360 Principles of Information Security
 CIS 3367 Architecting Operating System Security
 CIS 4204 Ethical Hacking
 CIS 4200 Penetration Testing
 CIS 4361 Information Assurance and Security Management for IT
 CIS 4365 Computer Security Policies and Disaster Preparedness
 EUH 3576 History of Soviet Union, 1917-1991
 EUS 3022 Russia
 HIS 4936 Proseminar in History: Global History of Communism
 INP 2101 Applied Psychology
 INR 3102 American Foreign Policy
 INR 3336 Intelligence and U.S. Foreign Policy
 INR 4254 Africa in World Affairs
 INR 3018 World Ideologies
 INR 3084 International Terrorism
 INR 3141 Global Security Policy
 INR 4083 Conflict in the World
 CCJ 3117 Theories of Criminal Behavior
 GEA 2000 World Regional Geography
 GEO 2400 Human Geography
 GIS 3006 Mapping & Geovisualization
 GEO 3164C Research Methods in Geography
 GEO 4114C Geographic Techniques and Methodology

GIS 4035C Remote Sensing of the Environment

GIS 4043C Geographic Information Systems

GIS 5049 GIS for Non-Majors

GEO 4421 Cultural Geography

GEO 4471 Political Geography

RUS 3500 Russian Civilization

SOP 4723 Cross-Cultural Psychology

SOP 4004 Social Psychology

Any study abroad course

Additional course options (including select foreign languages) may be approved by the advisor or program director.

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

Please see Appendix E for the eight-semester and four-semester sequenced plans of study.

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

IDS 4942: Community Internship

To provide students with a community internship experience.

Note: Although the course is approved as variable credit hour (1-4), the iSchool offers the internship course for three credit hours.

LIS 3261 - Introduction to Information Science

Foundations of the discipline, history, core theories and methodologies, and approaches to information science, with an emphasis on the critical role of information technology. Majors only or permission of instructor.

LIS 3353 - IT Concepts for Information Professionals

Covers the history, development, and current state of computer hardware and software. Also examines programming basics, networks, the internet and web, emerging technologies, information industries, and careers. Majors only or permission of instructor.

LIS 4414 - Information Policy and Ethics

Examines issues related to information use in today's society. Topics include governmental regulations and policies, information literacy, digital divide, information ethics, and intellectual property issues. Majors only or permission of instructor.

LIS 4204 Information Behaviors

Theories and issues surrounding various information behaviors, such as information needs, seeking, and use, and understanding the practices of information professionals and design of information systems. Majors only or permission of instructor.

ENC 3249 - Communication for IT Professionals

This course is devoted to the written and oral communication concerns of the 21st Century information technology professional. Students will be engaged individual and team development of professional and technical documents relevant to the IT field.

LIS 4934 - Senior Capstone for Information Professionals

This course affords students the opportunity to synthesize knowledge they have gained throughout their previous undergraduate coursework and identify how their integrated program of study provides real-world applicability and utility.

CIS 3360 - Principles of Information Security

Board review of Information Security and related elements. Includes terminology, history of the discipline, overview of information security program management. Suitable for IS, criminal justice, political science, accounting information systems students.

CIS 3367 - Architecting Operating System Security

This course examines tools and techniques for securing Windows and Linux operating systems. Students will acquire knowledge and skills to perform audit assessments and implement enterprise-wide operating system security.

CIS 4204 - Ethical Hacking

Provides an understanding of computing, networking, exploitation techniques, used for IT security. In testing, a legal ethical hacker tries to penetrate a system, finds its weakest link and analyzes ways to correct security flaws.

CIS 4361 - Information Assurance and Security Management for IT

The CIANA model, information security management techniques, and security concerns are presented. Topics include access control systems, network security, security management practices, cryptography, disaster recovery planning, and others.

CIS 4365 - Computer Security Policies and Disaster Preparedness

When an organization's functioning is interrupted by disasters, accidents, or natural events, a loss of data and/or productivity may occur. The impact on the organization is determined by how prepared it is for dealing with these disruptions.

LIS 4482 - Networks and Communications

This course is designed to provide a solid foundation in data communication and networking. Topics include local area networks (LANs), wide area networks (WANs), protocols used to implement networks & management issues of IT professionals. Majors or PI.

CIS 4200 - Penetration Testing

Penetration testing and related software tools are presented. Legalities and various cyber-attacks such distributed denial of service, man-in-the-middle, and password attacks are covered. Methods to correct security flaws are given.

CIS 4203 - Cyber Forensics and Investigations

Teaches the methods of acquiring, preserving, retrieving, and presenting data that have been processed electronically and stored on computer media for use in legal proceedings. Focus on MS Windows systems.

CNT 4403 - Network Security and Firewalls

This course surveys network security standards and emphasizes applications that are widely used on the Internet and for corporate networks. This course also examines Firewalls and related tools used to provide both network and perimeter security.

CAP 4790 - Data and Security Analytics

The course provides a detailed understanding of Data as a valuable asset of the organization and the need to secure it. Data also requires analytics to provide insights into trends and context of technical, economic, and social and environments.

CIS 3362 - Cryptography and Information Security

This course examines classical cryptography, entropy, stream and block ciphers, public key versus symmetric cryptography, one-way and trap-door functions, plus other specific tools and techniques in popular use.

CIS 3615 - Secure Software Development

Information is power. It also has value. Thus, there is an incentive for unscrupulous individuals to steal information. This course covers a number of different techniques to help developers to build enterprise-level systems that are secure and safe.

CIS 4216 - Aggressive Hacking - What Hackers do

Commonly known as Red Teaming, the course provides an understanding of computing, networking, programming concepts, and exploitation techniques, related to computer security. Focus of the course is to legally break-test into systems to improve security.

CEN 3722 Human Computer Interfaces for IT

Human-Computer Interface is the study of people, computer technology and the ways these influence each other. The basic foundations of HCI in terms of psychology, computer systems and their integration into design practice are discussed in the course.

CGS 3853 Web Systems for IT

Examines how web sites are developed. Focus on client-side and server-side scripting including HTML, JavaScript, and CSS. A substantial project requiring the design and implementation of an online web site is required

COP 2030 Programming Concepts

This course covers basic programming concepts using the Python language for implementation and developing problem solving skills.

LIS 2005 - Information Literacy

This course covers the development of undergraduate research and critical thinking skills to identify, evaluate, and use appropriate information sources to address educational, research, and other information needs.

LIS 3352 - Interaction Design

Covers the process of interaction design with an emphasis on a user-centered approach. Major topics include cognition; user needs assessment, interface design, modeling, prototyping, usability testing, and evaluation.

LIS 3361 - World Wide Web Page Design and Management

Covers a variety of strategies in designing and maintaining effective World Wide Web pages for publication on the Internet

LIS 3783 - Information Architecture

Covers design, organization, implementation, and maintenance of digital information spaces for human access, navigation, and use. Examines core concepts and dominating technologies in IA.

LIS 4365 - Web Design Technologies

Exploration of advanced applications of key Web Technologies.

LIS 4477 Clinical Decision Support

This course examines how to take advantage of the ever-increasing amounts of data available to healthcare professionals and utilize systems for knowledge discovery and clinical decision support.

LIS 4776 - Health Information Technology

The course focuses on students applying the IT knowledge to address real-life problems in the health community. Students address various topics with emerging technical solutions that can help improve health service, and health decision making

LIS 4779 - Health Information Security

Examines soft and technological threats to protected health information and methods for reducing these threats with a focus on HIPAA compliance

LIS 4785 – Introduction to Health Informatics

Introduction to core concepts and practices in the interdisciplinary field of Health Informatics

LIS 4788 – Management of Health Information Technology

An instructional program that describes the knowledge and skills required to develop, organize, store, retrieve, administer, and facilitate the use of collections of information in such formats as books, documents, manuscripts, databases, internet resources, filmed and recorded materials, and that prepares individuals for professional service as librarians and information professionals.

LIS 4800 – Introduction to Data Science

Introduction to Data Science will provide an overview of an up-and-coming field in the information sciences working with large amounts of data as it pertains to the collection, organization, analysis, visualization and preservation of that data.

LIS 4273 Advanced Statistics and Analytics

Building on elementary statistics, this course focuses on the assumptions, mechanisms, and data science applications for advanced statistical topics, such as logistic regression, maximum likelihood, bootstrapping, nonparametrics, & Bayesian methods.

LIS 4317 Introduction to Visual Analytics

This course introduces the science of analytical reasoning facilitated by combining statistical analysis with visualizations methods and techniques to promote effective understanding, reasoning and decision-making involving data.

LIS 4761 – Introduction to Data & Text Mining

Introduction to the Data Mining provides an in-depth study of what data mining is, how it is used, and how it has evolved, including different data types and applications of new technologies

LIS 4370 – R Programming for Data Science

This course teaches the use of R, a programming language and software environment for statistical computing and graphics, in applied Data Science. According to InfoWorld, R is the preferred statistical application among data scientists.

LIS 4805 – Predictive Analysis

This course will introduce the students to predictive analytics and analysis of probabilities and future trends using statistical algorithms and machine-learning tools.

LIS 4930 – Selected topics in Information Studies

Covers a variety of topics in the field of library/information science such as emerging technologies, administration and service, and current professional issues.

LIS 4482 – Networks and Communication

This course is designed to provide a solid foundation in data communication and networking. Topics include local area networks (LANs), wide area networks (WANs), protocols used to implement networks & management issues of IT professionals.

LIS 4671 – Introduction to Intelligence Studies

This course will introduce the students to the field of intelligence studies and to the U.S. intelligence community and its processes and practices.

LIS 4672 Critical Thinking and Methods for Intelligence Analysis

This course will introduce students to critical thinking and sensemaking as it applies to intelligence analysis, providing connections between the study of intelligence analysis and human judgment and decision-making.

LIS 4673 Open Source Intelligence (OSINT)

This course introduces students to the collection and integration of publicly available information and its uses in addressing specific information or intelligence requirements.

LIS 4029 Professional and Technical Communication for Analysts

Professional and technical communication for analysts introduces students to how they can critically think about risks, threats, and uncertainties, to write and brief effectively and to work productively on individual and group projects.

LIS 4762 - Geographic Information Systems for Data Science

This course introduces the basic principles and techniques of geographic information systems (GIS) with their applications to data science, and provides hands on experience with GIS analysis.

ANT 4352 Peoples of Africa

Dispel myths & stereotypes of Africa; focus on African geography, history, Western misperceptions of Africa, African worldviews, philosophy, literature, health issues, debt relief, refugees, & food acquisition, security.

ANT 2410 Cultural Anthropology

Students are exposed to methods and concepts for cross cultural study of the world's peoples. Case studies demonstrate variations in human adaptation and encourage an understanding of and appreciation for diverse cultures and their values.

ANT 4243 Middle East and North Africa

Studying the beliefs and practices of Middle Eastern and North African societies through the perspective and engagement with humanity that is anthropology. The focus is on different Islamic societies and the effects on them of western influence.

ASH 3404 Modern China

Political, economic, and social history of China from the time of the first major Western contacts (17th-18th Centuries) through the consolidation of socialism in the late 1950's, and the Great Leap Forward.

ASN 3014 China Today

Area study courses are multi-disciplinary in nature and deal with one or more countries of a region. Each course combines some measure of political, economic, historical, religious, geographic, anthropological, and sociological analysis in dealing with salient features and current problems.

ASN 3030 The Middle East

Area study courses are multi-disciplinary in nature and deal with one or more countries of a region. Each course combines some measure of political, economic, historical, religious, geographic, anthropological, and sociological analysis in dealing with salient features and current problems.

EUH 3576 History of Soviet Union, 1917-1991

A study of Soviet society under communism from the Revolution to the collapse of the USSR. Topics include the origins and development of revolutionary socialism, the Bolshevik seizure of power, Stalinism and the Great Terror, popular dissent and resistance, the treatment and experience of ethnic minorities, Gorbachev and the dissolution of the Soviet Union.

EUS 3022 Russia

Area study courses are multi-disciplinary in nature and deal with one or more countries of a region. Each course combines some measure of political, economic, historical, religious, geographic, anthropological, and sociological analysis in dealing with salient features and current problems.

HIS 4936 Proseminar in History: Global History of Communism

Advanced topics in the various fields of history. Emphasis on discussion of assigned readings and on research and writing of a major paper.

INR 3102 American Foreign Policy

Analysis of the development and scope of United States foreign policy, emphasizing goals and objectives, policy formulation and implementation, themes and issues.

INR 3336 Intelligence and U.S. Foreign Policy

An examination of the role of intelligence and the intelligence community in U.S. foreign policy, with emphasis on the period since World War II.

INR 4254 Africa in World Affairs

An examination of Africa's place and role in world affairs, including an analysis of the impact of external forces, international relations in post-colonial Africa, the relations of African states with the major world powers, the U.N. and its agencies.

INR 3018 World Ideologies

A course which details and examines the ideologies of today's independent countries; analyzing them in their political, social, cultural and historical context.

INR 3084 International Terrorism

A study of contemporary international terrorism and its causes, ranging from national liberation movements to networks of philosophical anarchists.

INR 3141 Global Security Policy

A study of security issues, regional and global (such as proliferation, arms control, arms transfer) as they relate to contemporary international politics.

INR 4083 Conflict in the World

An interdisciplinary course examining theories of conflict, conflict resolution processes and strategies, theories and peacemaking strategies, and the concept of Early Warning Systems related to the outburst of conflict.

CCJ 3117 Theories of Criminal Behavior

Provides a basic understanding of the complex factors related to crime, with concentration on principal theoretical approaches to the explanation of crime.

GEA 2000 World Regional Geography

Comparative and analytical analysis of representative world regions with emphasis on cultural, political, economic, environmental and physical diversity.

GEO 2400 Human Geography

Human geography encompasses those branches in geography which focus primarily upon the relationships between humans and the environments they construct. This course will examine the object of study of human geography, as well as explore many of the components of human geography, including economic geography, geopolitics, cultural geography, urban geography, population geography, and the relationships between geography and globalization.

GIS 3006 Mapping & Geovisualization

An introduction to the concepts underlying modern, computer-based mapping and to the collection, storage, and geovisualization of digital spatial data.

GEO 3164C Research Methods in Geography

Statistical analysis in geographic research.

GEO 4114C Geographic Techniques and Methodology

Selected topics in various geographic techniques and methodologies and their application.

GIS 4035C Remote Sensing of the Environment

Analysis of satellite images and aerial photographs for studies of the environment.

GIS 4043C Geographic Information Systems

An introduction to the concepts underlying Geographical Information Systems, with an emphasis on analytical capabilities of such systems in both raster and vector domains.

GIS 5049 GIS for Non-Majors

An introduction to the concepts underlying digital thematic mapping and geographical information systems (GIS) for non-geography majors and non-geography graduate students.

GEO 4421 Cultural Geography

The interrelationships of culture and nature, from ancient times to the present.

GEO 4471 Political Geography

The geographic factors underlying political decisions and influencing their outcome; the geographic consequences of these decisions; geopolitics.

RUS 3500: Russian Civilization

A survey of the cultural history of Russia.

SOP 4723 Cross-Cultural Psychology

Cross-cultural psychology focuses on understanding culture and psychology, emphasizing cross-cultural research methodology and critical thinking. Cross-cultural psychology underscores the connections between culture, emotions, thoughts, and behaviors.

INP 2101 Applied Psychology

The application of psychological principles and the functions of psychologist in education, government, industry, and clinical practice.

SOP 4004 Social Psychology

Survey of methods, empirical findings, and theoretical interpretations in the study of an individual's behavior as it is affected by others.

- 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.**

Currently, there are not any explicitly industry-driven competencies articulated for the B.S. in Information Science. Our faculty have brought their collective expertise and experience in their fields together to design a curriculum that covers the breadth and depth of areas we feel are important, including in each concentration, and do regular assessments of the curriculum to ensure it is relevant.

There are areas where emerging recommendations for competency-based curricula are being developed and may be pursued by our faculty. For instance, we are in the process of mapping individual courses in

our Information Security concentration to the National Security Agency's, Center of Academic Excellence standards for Cyber Defense Education. Achieving this status is within reach and would greatly benefit student success. Also, faculty in Health Informatics are involved in national level efforts to develop standards of program accreditation, which eventually will be articulated for undergraduate programs as well as graduate ones.

The range of concentrations available are sufficiently diverse that, in our view, it would be difficult to compose a single council that would advise on curriculum development and student assessment for all of work fields and disciplines. To develop the current curriculum, iSchool faculty, including the concentration coordinators, (a) consulted the professional literature in their disciplines to identify trends in education and workforce development and (b) reached out to key industry contacts to solicit their views on the knowledge and skills necessary to succeed in the workplace, including areas they thought academia might traditionally have neglected. We will continue to conduct those kinds of periodic reviews, but once the new evolution of the program is complete, we also plan to explore ways to systematically incorporate industry/community feedback, including the possibility of developing an advisory council.

- 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.**

There are currently no specialized accreditation agencies for Information Science.

- 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 Information Science major will be delivered fully online.

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).**

Full-time faculty who will teach in the BSIS degree program as found in Appendix A Table 4:

Faculty Member	BSIS Core/Concentration
Diane Austin, M.Ed. - Instructor	Web Development Technologies
Richard Austin, Ph.D. - Instructor	BSIS Core; Interaction Design
Kiersten Cox, MLIS - Instructor	General Education courses that are specific to the BSIS program (i.e., LIS 2005)
Alon Friedman, Ph.D. - Associate Professor	Data Science and Analytics
John Gathegi, Ph.D., J.D. - Professor	Information Security
Loni Hagen, Ph.D. - Assistant Professor	Intelligence Analysis Data Science and Analytics Concentration Coordinator
Hong Huang, Ph.D.- Associate Professor	Health Informatics
Vanessa Reyes, Ph.D. Instructor	BSIS Core
Denise Shereff, MLIS - Instructor	Health Informatics
John Sullivan, Ph.D. - Instructor/UG Director	Programming Web Development Technologies Concentration Coordinator
Steve Walczak, Ph.D. - Associate Professor	Health Informatics

Randy Borum, Psy.D., is a Professor and the Associate Director of the iSchool. He serves as the Coordinator for both the Intelligence Analysis and Information Security concentrations but has no teaching responsibility toward the undergraduate program.

James Andrews, Ph.D., is a Professor and the Director of the iSchool. He serves as the Health Informatics Concentration Coordinator but has no teaching responsibility toward the undergraduate program.

- 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 noted earlier in Section III, this budget proposal is for a program to replace an existing major that has been in existence for a number of years, thus resources are already being allotted to support the current major as part of the unit’s annual operating budget. Appendix A, Table 2 shows the costs of the faculty and other associated budgetary costs of the program. Faculty account for 4.20 person-years, totally \$508,091 total in salary and benefits for Year 1. Accounting for an annual salary increase of two percent, plus benefits, the faculty amount (salary increase, plus fringes) will be \$549,974 by Year 5. The A&P cost is for one third of the total effort of an Academic Services Administrator salary and benefits (\$18,600, Year 1 and \$20,406 Year 5, accounting for a salary increase and fringe benefits). No advising budget is required as this is coordinated and budgeted centrally in the College of Arts and Sciences

Given the amount of applied aspects of the curriculum, adjuncts with exceptional experience and expertise are used regularly. This is reflected in the \$24,000 in OPS (Year 1) and \$26,500 in Year 5. The increase in Year 5 is due to an annual salary increase of two percent per year.

No additional resources are required specially given that the program has been underway for over nine years.

- 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 faculty CVs are included as Appendix F.

- 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 iSchool has expanded into innovative areas while maintaining quality and strength in existing ones. Through systematic, broad-based planning we have taken actions that have increased productivity in teaching, research, and service across programs and in support of our overall mission and vision.

Key differentiators of the School include:

- An array of innovative, unique degree programs
- Faculty that exemplify interdisciplinary collaborative practice
- Distance learning programs with a local, personal feel

Productivity in Research

- Awarded over \$3,700,000 in external funding between 2015-2019, and nearly \$11.5 million in proposals submitted by our faculty
- Awarded \$5,257,961 in external funding between 2008-2015, more than double the amount awarded in the prior seven-year period
- Elected to associate-level membership in the iSchool Consortium in 2016
- LIS master's program is ranked #28 nationally, and 1st among programs without an associated doctoral program.
- USF's School of Information faculty have been funded by a range agencies and organizations, including:
 - National Science Foundation (NSF)
 - National Institutes of Health (NIH)
 - National Security Agency (NSA)
 - National Research Foundation of Korea
 - Institute for Museum and Library Services (IMLS)
 - American Library Association
 - Medical Library Association
 - Agency for Healthcare Research and Quality (AHRQ)
 - Centers for Disease Control and Prevention (CDC)
 - U.S. Department of Agriculture
 - Office of the Director of National Intelligence
 - Defense Intelligence Agency
- iSchool is affiliated with five, well-regarded academic journals:
 - *Journal of Strategic Security* (Borum, Sr. Editor)
 - *Military Cyber Affairs* (Borum, Sr. Editor)
 - *Journal of Organizational and End User Computing* (Walczak, Editor-in-Chief)
 - *Library Quarterly* (Taylor, Co-Editor)
 - *Journal of Education in Library and Information Science* (Andrews, Editorial Board)
- The USF iSchool's metrics for the year listed in Academic Analytics (2016-17) are as follows:
 - 92% of faculty had a peer-reviewed article
 - Faculty averaged 5.8 articles per faculty member
 - 92% of faculty had an article cited
 - Scholarly Research Index was at the 51.4 Percentile

Productivity in Teaching

- Top producer of Grad1 SCH in USF's College of Arts & Sciences
- Awarded approximately \$2 million in Scholarship Grants from the National Security Agency

- Recognized by the Defense Intelligence Agency as an Intelligence Community Center of Academic Excellence (IC-CAE)
- First School of Information in U.S. to house a graduate degree program in intelligence studies
- First STEM-based Intelligence Studies graduate program
- First graduate program to anchor the study of intelligence in the discipline of Information Science
- Responsive, high-quality instruction: In March, 2019, an external evaluator for the BSIS program met with students at different points in their degree completion (some near completion, others towards the beginning of their programs of study), and according to his report: "all praised the quality of instruction, the dedication of the faculty, the support provided them, and program's flexibility." On a five-point scale, student ratings for all courses taught by iSchool faculty, both undergraduate and graduate, consistently range above 4.0
- The following programs and major have increased the number of STEM graduates, and have attracted more women and minorities to STEM degrees: BSIS, M.S. in Cybersecurity/Cyber intelligence Concentration and M.S. in Intelligence Studies -both concentrations, plus related Graduate Certificate programs.
- M.S. in Cybersecurity with a concentration in Cyber Intelligence is the largest of the four-degree concentrations, comprising about half of the program's 500 students
- The STEM Master of Science in Intelligence Studies has over 100 students, across both of its concentration areas (Strategic Intelligence and Cyber Intelligence)
- Excellence in online education. Both master's degrees and the undergraduate major are fully online. iSchool faculty were some of the first in the College of Arts and Sciences to offer online classes and have been among the most productive.
- Doubled the size of the undergraduate program within two years of its re-structuring
- Developed a new undergraduate minor in Intelligence Studies (12 cr.), which draws students from majors across the University
- Instructor (Sullivan) received an Undergraduate Teaching Award

Productivity in Service

- Two iSchool faculty (Borum and Gary) have been awarded the Order of Thor Medal by the Military Cyber Professionals' Association for distinguished contributions
- Distinguished University Professor, Kathleen de la Pena McCook, has received lifetime achievement awards from several major librarianship societies.
- President of Beta Phi Mu, International Honor Society for Library and Information Science (Gregory)
- Board of Directors, American Society for Information Science and Technology (Andrews)

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 University of South Florida (USF) is accredited by the Southern Association of Colleges and Schools' Commission on Colleges to award associate, baccalaureate, master's, specialist and doctorate degrees. 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 and the Hinks and Elaine Shimberg Health Sciences Library, both located on the Tampa Campus; the Nelson Poynter Memorial Library, USF St. Petersburg campus; and an Information Commons at the USF Sarasota-Manatee campus.

Access to print resources at the USF Tampa Library is available 24/5, and access to electronic resources is available remotely 24/7.

The USF Libraries inspire research, creativity, and learning by connecting the USF community to relevant and high-quality information. Our vision is to become the center of a highly engaged university community, driven to produce high-impact research and to nourish creativity. Together, the USF Libraries provide access to more than 2 million volumes and an extensive collection of electronic resources including approximately 64,928 e-journal subscriptions and over 900 aggregator databases containing another 92,855 unique e-journal titles, 693,313 e-books, and 826,000 digital images. In addition, students have access to over 83,000 audio/visual materials including electronic media, music scores, audiobooks, CDs, and DVDs.

As a result of the UBorrow agreement between USF and the other Florida state universities and colleges, USF students and faculty have rapid access to nearly 20 million additional books. USF students and faculty can also take advantage of a well-regarded interlibrary loan (ILL) service, which will quickly obtain items not held by the USF Libraries.

The USF Libraries endeavor to develop and maintain a research collection that satisfies the resource needs of the undergraduate and graduate curriculums in College of Arts and Sciences School of Information (iSchool) and also meets the specialized needs of the students and faculty for a Bachelor of Science program in Information Science.

Databases accessible to USF students and faculty that are most likely to contain content related to information studies include:

- EBSCO Library Literature & Information Science Full Text
- EBSCO Library Literature & Information Science Retrospective
- ProQuest Library & Information Science Abstracts (LISA)
- ProQuest Dissertations and Theses A&I
- Elsevier Engineering Village (Compendex)
- IEEE Xplor
- Web of Science
- Elsevier ScienceDirect
- SpringerLink

Additional content related to information studies issues can be found in the following accessible databases geared toward business and psychology:

- ProQuest ABI/INFORM Global
- EBSCO Business Source Premier
- EBSCO PsycINFO

The following journals related to information studies are available to USF students and faculty:

- | | |
|--|--|
| • <i>American Documentation</i> | • <i>Data Technologies and Applications</i> |
| • <i>Annals of Library and Information Studies</i> | • <i>Evidence Based Library and Information Practice</i> |
| • <i>Aslib Journal of Information Management</i> | • <i>Health Information and Libraries Journal</i> |
| • <i>Brazilian Journal of Information Science</i> | • <i>Informacijos Mokslai</i> |
| • <i>Bulletin of the American Society for Information Science and Technology</i> | • <i>Information and Learning Science</i> |
| • <i>Computer and Information Science</i> | • <i>Information Development</i> |
| | • <i>Information Processing & Management</i> |

- *Information Research*
- *Information Sciences*
- *Information Science and Computing*
- *Information Sciences and Technologies*
- *Information Searcher*
- *Information Services & Use*
- *The Information Society*
- *Information Technology and Libraries*
- *Informing Science*
- *Interdisciplinary Information Sciences*
- *The International Information & Library Review*
- *International Journal of Information Acquisition*
- *International Journal of Information Dissemination and Technology*
- *International Journal of Information Management*
- *International Journal of Medical Informatics*
- *International Research: Journal of Library and Information Science*
- *JLIS.it: Italian Journal of Library and Information Science*
- *Journal of Digital Information Management*
- *Journal of Information and Organization Sciences*
- *Journal of Information & Optimization Sciences*
- *Journal of Information Science*
- *Journal of Information Science Theory and Practice*
- *Journal of Quantum Information Science*
- *Journal of the American Society for Information Science and Technology*
- *Journal of the Association for Information Science and Technology*
- *Library Hi Tech*
- *Library & Information Science Research*
- *Library Times International*
- *LIBRES: Library and Information Science Research Electronic Conference*
- *Technicalities*
- *Upgrade: The European Online Magazine for the IT Professional*
- *Webology*

An examination of the USF Libraries Catalog for books on relevant topics indicates:

Print book titles: 115

Ebook titles: 24,334

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.

No additional library resources are required. A large portion of the USF Libraries' budget supports the continuation of electronic resources. Information Science, Data Science, Information Security, Health Informatics, and Web Development Technologies are well represented throughout the USF Libraries' electronic journal subscriptions.

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.

Courses for the BSIS are delivered online, eliminating any need for additional classroom, teaching or research laboratory space.

The **USF Research Computing Student Cluster (SC)** is designated for classwork-related use. As of July 2018, SC consists of approximately 22 nodes with 444 processor cores running Red Hat Enterprise Linux 6. Seven of these nodes are also equipped with single Nvidia Tesla M2070 GPUs. SC has 1.296TB of

memory shared across the nodes and a 2.4PB replicated file system for home directories. Back-up is nightly. Access to the SC is requested/granted on a class-by-class basis (requested by class instructor). Department classes make use of SC for instruction. Program Design (COP 3514) uses SC to compile, test, and debug C programs on a networked Unix/Linux system.

The **campus network** provides high speed interconnection of the above resources along with individual faculty and staff workstations. The network is built using a mesh approach with 1 Gb/s Ethernet to the desktop and 10 Gb/s Ethernet connections between some switches on campus. The campus is also connected to the Internet2 research network. The campus also provides Wi-Fi Internet connection to students, faculty, staff, and guests.

Offices and associated equipment

We believe that we have adequate and sufficient office space to provide an atmosphere conducive to learning and to support the attainment of the curriculum outcomes.

- 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 space or labs are needed to carry out the requested new degree 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.**

As the basic structure of the proposed BSIS degree program is already operational, and the component courses are already being taught, no additional capital expenditures will be needed beyond what is being covered currently and we do not anticipate any increased costs in non-I&R activities.

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

The program is delivered entirely online. All instructional support software, including the main learning management system, Canvas, is supported centrally by USF Information Technology. Individual faculty make use of certain development software to help in the creation of lectures and course material, but any further software or computing needs are provided to, or easily obtained by, students with guidance from the faculty (e.g. using R Studio or other open source software). No additional specialized equipment, supporting either instruction or research, 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.**

The proposed degree program will not require any additional specialized equipment.

- 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 needed to implement.

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 currently no fellowships or assistantships specifically for undergraduate students in 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 iSchool has an extensive network of industry partners to support experiential learning opportunities for interested BSIS Students, especially for those local to the Tampa Bay area. Current partnerships include:

- CyberFlorida (Florida Center for Cybersecurity)
- Dell/EMC Academic Alliance
- NorthCom/NORAD Academic Alliance
- US Special Operations Command (USSOCOM)
- SOFWERX
- Defense Intelligence Agency
- National Geospatial Intelligence Agency
- National Security Agency
- Military Cyber Professionals' Association
- International Association for Intelligence Education (IAFIE)
- FBI Behavioral Analysis Unit - 1
- Center for Strategic and Diplomatic Studies (USF World)
- Raymond James Financial
- Citi
- Pasco County Sheriff's Office
- Florida Library Association
- Florida Division of Library and Information Services
- Tampa Bay Library Consortium
- All library systems across state
- BayCare Health
- WellCare

The BSIS major does not have an internship *requirement*. As a practical matter, because the Information Science major is offered fully online, and students may be dispersed around the country¹⁵ – or even the world – an internship requirement would logistically be very difficult to manage. We have, however, used our IDS 4942 (Community Internship) mechanism to create experiential learning opportunities for interested BSIS students. Students work collaboratively with the faculty and site supervisors to develop a set of agreed-upon learning objectives for their practicum experience. The faculty supervisor also receives feedback on the student's on-site performance, strengths and weaknesses, and uses reflective learning assignments to help the student integrate and apply what they have learned in their courses at the training site. This approach has been manageable, and effectively serves the program objectives. We have not been overwhelmed with students requesting internship experiences. Between Program Year 1 and

¹⁵ The University of South Florida is an approved member of NC-SARA, which is recognized by 49 states and the District of Columbia. The State Authorization Reciprocity Agreement (SARA), a national initiative to provide more access to online courses while maintaining compliance standards with state regulatory agencies, allows institutions to provide online courses outside of their own state borders by seeking and maintaining state approvals via a streamlined process. NC-SARA is a voluntary, regional approach to state oversight of post-secondary distance education. Florida joined SARA through the Southern Regional Education Board (SREB) compact.

Year 5 we will continue to assess student need and demand for internship experiences, as well as input from our industry contacts.

We also help students connect with industry by encouraging them to participate in career fairs organized by USF's Career Services and to use the popular online platform, Handshake, to facilitate those connections.

**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**	60	50	45	38	25	21	15	13	10	8
Students who initially entered the university as FTIC students and who are progressing from the lower to the upper level***	60	50	75	63	85	71	100	83	115	96
Florida College System transfers to the upper level***	65	54	77	64	90	75	105	88	115	96
Transfers to the upper level from other Florida colleges and universities***	15	13	20	17	22	18	23	19	30	25
Transfers from out of state colleges and universities***	18	15	20	17	22	18	24	20	30	25
Other (Explain)***	0	0	0	0	0	0	0	0	0	0
Totals	218	182	237	198	244	203	267	223	300	250

* 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 columns 1+...+7	Funding Source						Subtotal columns 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	
Columns	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Faculty Salaries and Benefits	508,091	0	0	0	0	0	0	\$508,091	549,974	0	0	0	0	0	\$549,974
A & P Salaries and Benefits	18,600	0	0	0	0	0	0	\$18,600	20,460	0	0	0	0	0	\$20,460
USPS Salaries and Benefits		0	0	0	0	0	0	\$0	0	0	0	0	0	0	\$0
Other Personal Services	24,000	0	0	0	0	0	0	\$24,000	26,500	0	0	0	0	0	\$26,500
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
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	\$550,691	\$0	\$0	\$0	\$0	\$0	\$0	\$550,691	\$596,934	\$0	\$0	\$0	\$0	\$0	\$596,934

*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)	4.20	4.20
A & P (FTE)	1	1
USPS (FTE)	0	0

Calculated Cost per Student FTE

	Year 1	Year 5
Total E&G Funding	\$550,691	\$596,934
Annual Student FTE	182	250
E&G Cost per FTE	\$3,026	\$2,388

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
Faculty salary and benefits from the current BS in Information Studies to be used in new BS in Information Science	508,091	508,091	\$0
USPS salary and benefits used to support the BS program	18,600	18,600	\$0
Adjuncts needed to support the current and new BS program	24,000	24,000	\$0
Totals	\$550,691	\$550,691	\$0

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

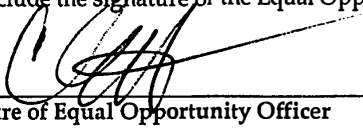
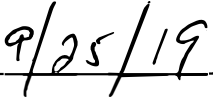
Board of Trustees Regular Meeting - New Business - Consent Agenda

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	APPENDIX A													
2	TABLE 4 ANTICIPATED FACULTY PARTICIPATION													
3	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	
4	A	Richard Austin, Ph.D.	Instructor	Non-tenure	Fall 2019	9	0.75	0.50	0.38	9	0.75	0.50	0.38	
5		Information Studies/LIS												
6	A	Diane Austin, M.Ed.	Instructor	Non-tenure	Fall 2019	12	1.00	0.50	0.50	12	1.00	0.50	0.50	
7		Instructional Technology/LIS												
8	A	Kiersten Cox, MLIS	Instructor	Non-tenure	Fall 2019	12	1.00	0.50	0.50	12	1.00	0.50	0.50	
9		Library & Information Science												
10	A	Alon Friedman, Ph.D.	Associate Professor	Tenured	Fall 2019	9	0.75	0.50	0.38	9	0.75	0.50	0.38	
11		Information Science												
12	A	John Gathegi, Ph.D.	Professor	Tenured	Fall 2019	9	0.75	0.25	0.19	9	0.75	0.25	0.19	
13		Library & Information Science												
14	A	Loni Hagen, Ph.D.	Assistant Professor	Tenure-earning	Fall 2019	9	0.75	0.50	0.38	9	0.75	0.50	0.38	
15		Information Science												
16	A	Hong Huang, Ph.D.	Associate Professor	Tenured	Fall 2019	9	0.75	0.13	0.10	9	0.75	0.13	0.10	
17		Library & Information Science												
18	A	Vanessa Reyes, Ph.D.	Instructor	Non-tenure	Fall 2019	9	0.75	0.75	0.56	9	0.75	0.75	0.56	
19		Library & Information Science												
20	A	Denise Shereff, MLIS	Instructor	Non-tenure	Fall 2019	9	0.75	0.13	0.10	9	0.75	0.13	0.10	
21		Library & Information Science												
22	A	John Sullivan, Ph.D.	Instructor	Non-tenure	Fall 2019	9	0.75	1.00	0.75	9	0.75	1.00	0.75	
23		Mgt. of Information Systems												
24	A	Steve Walczak, Ph.D.	Associate Professor	Tenured	Fall 2019	9	0.75	0.50	0.38	9	0.75	0.50	0.38	
25		Comp and Information Science												
26		Total Person-Years (PY)							4.20				4.20	
27														
28	Faculty Code				Source of Funding		PY Workload by Budget Classification							
29														
30	A	Existing faculty on a regular line			Current Education & General Revenue				4.20				4.20	
31	B	New faculty to be hired on a vacant line			Current Education & General Revenue				0.00				0.00	
32	C	New faculty to be hired on a new line			New Education & General Revenue				0.00				0.00	
33	D	Existing faculty hired on contracts/grants			Contracts/Grants				0.00				0.00	
34	E	New faculty to be hired on contracts/grants			Contracts/Grants				0.00				0.00	
35	Overall Totals								Year 1	4.20	Year 5		4.20	
36														

Worksheet Table 4 Faculty

APPENDIX B

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

 _____ Signature of Equal Opportunity Officer	 _____ Date
Todd A. Chavez <small>Digitally signed by Todd A. Chavez DN: cn=Todd A. Chavez, o=University of South Florida, ou=USF Libraries, email=tchavez@usf.edu, c=US Date: 2019.09.18 16:06:37 -0400</small>	9/18/19 _____ 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: Letter of Support

Re: USF's B.S. in Information Science

Elfayoumy, Sherif <selfayou@unf.edu>

Wed 8/28/2019 1:31 PM

To: Borum, Randy <wborum@usf.edu>

Cc: Andrews, James <jimandrews@usf.edu>; Brown Hernandez, Cynthia <cynthiab@usf.edu>; Potter, Robert <potter@usf.edu>; Brayton, Shawn <sbrayton@unf.edu>; Klostermeyer, William <wkloster@unf.edu>

Thank you Randy for sharing the below information with us. Thought of also letting you know that we have another proposal for a BS in Information Science program, besides the one in Information Systems you referenced below. We requested CIP 11.0104 for Info Science and 11.0401 for Info Systems. Of course program names are too short to capture the precise program descriptions. At any rate, I wish you luck in the approval process and success in the implementation. Let me know if we can be of any help.

Regards,
Sherif

Dr. Sherif Elfayoumy
Director & Professor, School of Computing
University of North Florida
904-620-2985

From: "Borum, Randy" <wborum@usf.edu>
Date: Tuesday, August 27, 2019 at 8:07 AM
To: Sherif Elfayoumy <selfayou@unf.edu>
Cc: "Andrews, James" <jimandrews@usf.edu>, "Brown Hernandez, Cynthia" <cynthiab@usf.edu>, "Potter, Robert" <potter@usf.edu>
Subject: USF's B.S. in Information Science

Dear Dr. Elfayoumy

My name is Randy Borum. I am a Professor and Associate Director of the School of Information (iSchool) at the University of South Florida.

As you may know, the Florida Legislature directed USF to consolidate its existing university system (to include the separately accredited USF-St. Petersburg and USF-Sarasota/Manatee institutions) into a single entity. Part of that effort requires USF to de-conflict its CIP Codes across colleges.

For about 10 years, the iSchool in USF's College of Arts & Sciences has operated a Bachelor of Science in Information Studies (BSIS) under an Information Technology CIP Code. That CIP Code is already used in our College of Engineering, so the BSIS is proposing to change its CIP Code to one that aligns more directly with the focus of our program. The 11.0401 CIP Code (Information Science/Studies) accomplishes that objective, and we have received approval from the Board of Governors to use it for our degree proposal.

While there are no undergraduate programs in the SUS approved degree program inventory using the 11.401 CIP (we have a graduate program here in the iSchool that does), during our preparation we discovered a new degree proposal from your College/School using that CIP for a proposed B.S. degree in Information Systems. I don't know the status of that proposal, but as a courtesy, I wanted to reach out to make you

Appendix C: Letter of Support

aware of our efforts, and to assure you that they should not conflict or compete at all with yours at UNF.

Although our current proposal uses CIP Code 11.0401, we explain clearly that our degree is for Information Science, rather than Information Systems. Our program is also offered fully online and is not seeking ABET accreditation. Moreover, we are requesting that the BOG create a "Track 2," for CIP Code 11.0401 with a different set of State Mandated Prerequisites. The programs are plainly distinct, and nothing in what we are proposing should have any impact on your existing or emergent UNF programs. In the spirit of collaboration, we just wanted to share what we are doing, but we are happy to answer any specific questions you might have.

We wish you great success with your new Information Systems program, and if there is anything we can do to support your efforts, please don't hesitate to reach out.

Sincerely,

Randy

Dr. Randy Borum
Professor and Director of Intelligence Studies
Associate Director, School of Information (iSchool)
University of South Florida
borum@usf.edu
SelectedWorks: http://works.bepress.com/randy_borum/

Appendix C: Letters of Support



Nov. 7, 2019

To Whom It May Concern:

This is to confirm the approval to use College of Arts and Sciences courses as electives in the proposed Information Science degree program.

Sincerely,

A handwritten signature in black ink, appearing to read "Eric Eisenberg", is written in a cursive style.

Eric Eisenberg, Dean
College of Arts and Sciences
University of South Florida

Appendix C: Program Review

**Review of the Bachelor of Science in Information Studies Degree
Program**

John Carlo Bertot
Associate Provost for Faculty Affairs
Professor, College of Information Studies
University of Maryland College Park

Submitted May 6, 2019

I. Executive Summary

The external evaluator conducted a program evaluation of the University of South Florida's Bachelors Degree in Information Studies (BSIS, CIP 11.0103)¹ in the School of Information within the College of Arts & Sciences at the request of the Division of Institutional Effectiveness in the Office of Decision Support. The evaluator was Dr. John Bertot, Associate Provost for Faculty Affairs and Professor in the College of Information Studies at the University of Maryland College Park.

The on-site review occurred March 18-20, 2018, during which time the evaluator met with and interviewed 22 faculty, administrators, and staff, as well as eight students enrolled in the BSIS program. Prior to the on-site visit, the evaluator was provided with multiple documents to review, including:

- A self study of the degree program, inclusive of a variety of data regarding the program (e.g., courses, graduate employment, enrollment).
- A College and Dean Report, which provided an overview of the College and the degree program within that larger context.
- A Department (School) self study, which contextualized the degree program within the School.

Included within the documentation were specific questions that the Dean of the College of Arts & Sciences requested that the evaluator explore:

1. Does the School have a plan with identified metrics for monitoring continued improvement in scholarship/research? Are these targets well aligned with university and disciplinary expectations and aspirations?
2. Are the current areas of research emphasis appropriate for increasing the scholarly visibility of the program?
3. Do School faculty have relationships across the campus that might be used to develop funded interdisciplinary research projects? Could they?

¹ The original name of the degree was the Bachelor of Science in Information Technology.

4. Does the School have a good process for evaluating and improving instruction?
5. Does the School have a regular process to evaluate the curriculum and ensuring consistency with disciplinary directions? Does the undergraduate program adequately prepare students for future education or careers?
6. Does the program have robust internship opportunities? Are study abroad opportunities offered as an important part of the undergraduate experience?
7. Are program assessments appropriate for informing program improvements?
8. How well does the School connect with its undergraduate and graduate alumni, both to evaluate the success of their preparation and to engage them in the future success of the department?
9. Does the culture of the School promote collegiality and shared decision making?
10. Does the School have a process to groom future leadership in order to sustain momentum?
11. Is the School well poised to take advantage of the state-wide initiative to hire accomplished faculty at the senior levels? Could they do so in a way that would help enhance their national reputation?

Some of the questions, it should be noted, go beyond the degree program's assessment and focus on the Department (School) itself. Given the structure and nature of site visit with its focus on the undergraduate degree and faculty/staff associated with that degree, it was not possible to fully explore questions regarding the School itself.

A Brief History of the Program

The School of Information inherited the program in Fall 2010. Largely delivered online by USF Polytechnic (now defunct) in collaboration with USF Sarasota/Manatee, the program was then called the Bachelor of Science in Information Technology and administered by the USF Office of Undergraduate Studies. This added to the School's degree program portfolio, which now includes

two master's degree programs and two undergraduate degree programs.² At the time, the School had been a department predominantly focused on delivery of its accredited professional (Library and Information Science/Studies) master's degree. Further, at the time USF was in the process of becoming a system comprised of the main campus, the St. Petersburg campus, and the Sarasota-Manatee campus within the State University System of Florida.

Since its absorption into the School of Information, the degree program was renamed, becoming a Bachelor of Science in Information Studies (BSIS). After a major restructuring of the program in 2016, more focused recruitment, and concerted efforts on the part of the School, the program has grown to over 200 majors - representing an overall growth of 36% from the number of majors between AY2013-2014 and AY2017-2018.

The program has undergone significant revision recently, and the assessment and impact of those revisions continue to evolve. The revisions, however, reflect a broad understanding of the data science, health information and technology, and cybersecurity domains. Further, the program is linked to strategic University areas (particularly in the health and cybersecurity areas); key emerging employment areas such as health informatics, security, and data science/analytics; and local and state economic/employment needs and areas of growth.

II. Evaluation of Program Quality

The degree program is an interdisciplinary STEM program that prepares students for careers in the knowledge economy. The BSIS is derived from the field of Information Science, offering students both a societal perspective as well as technical proficiency. What distinguishes the program from other technology degrees is its focus on the intersection of people, information, and technology. More specifically, the program's curriculum seeks to provide its graduates with an understanding of:

² The School participates in the University-wide (5 Colleges and over 20 Departments participate) Bachelor of Science in Health Sciences and is responsible for the management of the degree program's largest concentration (Health Information Technology).

- How people interact with information and technology;
- The complexities of the information society;
- Information creation, storage, and organization applications and theories;
- Information architecture; and
- Competencies and skills required to design, implement, and evaluate new tools and approaches to solving information problems.

Overall, the program meets these objectives through a relevant, appropriate, and updated (2016) curriculum.

Curriculum

The BSIS offers students four concentrations:

- Data Science & Analytics, which emphasizes deep knowledge discovery through data exploration, analysis, and inference;
- Information Security, which emphasizes cybersecurity and protecting information or data from unauthorized, access, use, misuse, disclosure, destruction, modification, or disruption;
- Health Informatics, which emphasizes design, development, adoption, and application of IT-based innovations in healthcare services delivery, management, and planning; and
- Information Science and Technology, which is a general program of study designed for students who prefer to take a wide range of courses.

These concentrations align well with articulated strategic University priority areas (particularly health and cybersecurity), the regional economy, economic development goals of the State, and broader workforce needs and opportunities.

A review of selected course syllabi, course description, and concentration goals revealed course and degree content that is current and timely, providing students with requisite “hands-on” skills (such as an understanding of data, the use of R for analytics, client/consulting experiences with local organizations, and more) as well

as experiential learning opportunities. Such an approach offers student a well-implemented blend of conceptual, applied, and contextual skills that both enhance learning and emphasize actual implementations of various technologies, resources, and services.

What was less clear to evaluator was the robustness of an ongoing review and revision process for individual courses, concentrations, and other curriculum matters. As indicated in the material shared with the evaluator in advance, a number of assessment pieces (e.g., learning outcomes assessment, curriculum mapping) are under development. As these are more fully fleshed out, the evaluator recommends that the assessment processes developed ensure the currency of courses and concentrations that deploy a team-based approach designed to ensure continued coherence rather than potentially individual updates that can cause misalignment between courses and overall learning outcomes. Further it is recommended that metrics be developed for determining the success of concentrations -- for example, how might the School determine if concentrations should be expanded or discontinued?

As mentioned above, the review identified efforts designed to provide students with applied learning opportunities through partnerships with community organizations. This is a valuable learning experience for students, but also serves to further the School of Information's ties to its surrounding organizations. Discussions with faculty exhibited a varied approach and/or understanding of these internship opportunities, with some faculty expressing a desire to have more partnerships and experiences for students - but also to perhaps serve as possible research venues. An identified need is to have a more centralized and systematic process around the development of internship opportunities, and by extension, research venues for faculty.

Faculty

As reported, the School currently has 25 faculty, 13 of which are on the tenure track or tenured (3 assistant professors, 5 associate professors, 5 professors), 12 of which are instructional and not on the tenure track (*Undergraduate Program Self-*

Study, Appendix). Thus the faculty is roughly evenly split between tenured/tenure track and non-tenure track faculty. Since 2013, the faculty has grown from 18 to 25, with the greatest growth exhibited in the instructor rank (from 6 to 12). The instructors produce the most student credit hours per faculty member in the BSIS program.

The evaluator met with several faculty responsible for the design and instruction of courses within the BSIS degree. It is noted that not all faculty within the School teach in or have involvement with the undergraduate program. Some faculty, for example, have primary instructional responsibilities in one of the School's graduate programs. Given this, it is not clear that there is full appreciation for the BSIS across the entire School. It is important to note, however, that the evaluator did not meet with all faculty to further ascertain the extent of support for the BSIS across the entire School.

The faculty with whom the evaluator met, along with a review of their qualifications and materials, demonstrate a faculty with appropriate subject matter expertise; applied technical and data skills; enthusiasm; connections to key employment communities (e.g., security, cybersecurity, data); and levels of engagement with students and others that provide an overall positive experience for students. Indeed, the evaluator met with students at different points in their degree completion (some near completion, others towards the beginning of their programs of study), and all praised the quality of instruction, the dedication of the faculty, the support provided them, and program's flexibility.

One area for further exploration would be the creation of more cohesion amongst the faculty with instructional responsibilities in the BSIS program. There seemed to be pockets of collaboration between and among the faculty, but there was not an overall sense of collective effort.

Research Directions

USF as a university is undergoing major changes. During the site visit, the finalists for a new University president were on campus, and a new president was selected

by the end of the week. This change in leadership will undoubtedly bring institutional change, on top of already significant change brought by the University's designation as a Preeminent Research University.

The faculty with whom the evaluator met have scholarship profiles in a broad range of areas including health informatics, data analytics (in multiple sectors including industry and government), data science, information policy, cybersecurity, knowledge management, and information science. Thus the areas of faculty research can be, and are, integrated into the curriculum.

In this regard, the School has explored the possibility of establishing an Institute of Health Science Information and establishing a Center for Social Science Informatics. Both efforts are intended to promote an enhanced educational and research experience for students and faculty. The evaluator concurs that the creation of these centers would serve to catalyze both the research enterprise and overall integration of research and instruction in the BSIS and, as such, encourages further exploration of these Centers.

The extent to which faculty related to the BSIS program are research active varies. There are some faculty who are both highly grant and publication active, those who are publication active but lack funded research, and those who are primarily instructional. Publications range from books published with academic presses, refereed journal articles, articles published in professional journals, conference proceedings, and presentations at professional and scholarly conferences.

The materials provided the evaluator included measures of productivity provided via *Academic Analytics* which show that the faculty's productivity measures favorably as compared to several top tier schools of information (iSchools) at Big Ten and other regarded Universities. One would need to further ascertain the methodology used by *Academic Analytics* to further assess the comparisons.

Further, data provided in the *Department Self-Study* indicate that the total number and amount of grants received by the faculty has increased from \$2,201,326 between 2002-2008 (14 grants total) to \$5,278,781 between 2008-2015 (22 grants

total). This represents an increase from an average of \$314,475 per year to \$754,111. The evaluator did not have access to the number of faculty going back to 2002, and thus is unable to calculate an average funding amount per faculty member to determine whether overall grant activity by faculty member has increased. Funding sources include the National Science Foundation, National Institutes of Health, National Security Agency, Center for Disease Control and Prevention, and the Institute of Museum and Library Services, among others.

As noted, the faculty are in general research active. Overall, however, the School could enhance its funded research portfolio. Doing so would lead to a more robust research infrastructure and profile within the College, on campus, and in the broader iSchool community. That said, the School suffers from the lack of a PhD program that would facilitate a rise in research activities in the School. Such a program could also foster connections across campus with faculty from other units serving on dissertation committees. Although there have been attempts to create a PhD program within the School, a number of factors, including those external to the School, have prevented the implementation of a doctoral program in the School.

A further consideration to enhance the School's research profile and productivity would be the development of a postdoc environment. The Preeminence designation of the University, its focus on health initiatives and cybersecurity (as examples), make the School an attractive location for postdocs. It may also serve as a way to recruit high quality faculty into the School.

Students

The BSIS program continues to grow. It has grown to a reported 218 majors from 165, representing an overall growth of 36% in the number of majors between AY2013-2014 and AY2017-2018.³

³ The evaluator notes that there are different numbers of majors presented in the various documents shared as part of the review. The calculations presented are taken from the Number of Majors table in the *Undergraduate Program Self-Study*, p. 7.

The program exhibits a number of positive attributes regarding students. These include:

- An overall positive growth trajectory that has not yet reached saturation.
- A student body growing in diversity. The number of students of color continues to increase, as does the number of women in the program.
- The number of degrees awarded is growing.
- The time to degree completion is decreasing.
- The number of credit hours taken by students is growing.

It is also important to note that the students who enroll in the program do so overwhelmingly on a part-time basis. Further, nearly half of the students transfer into the program from other Florida colleges. Courses are primarily delivered online, though some courses pursue a blended learning approach designed to provide in-class and engaged experiences. The primarily online instruction and part-time student enrollment can make it challenging to foster a sense of student body and faculty community as well as promote faculty-student collaborations in research and other activities. However, this approach means that the program is accessible to individuals who are already employed or cannot commit to full-time enrollment, thus providing access to a sought-after degree to those who might otherwise not be able to pursue a University degree.

One caution is that the BSIS degree is a non-limited enrollment program. While there is room for continued growth to meet what is anticipated to be increased demand, there is an upper limit to the number of students that the BSIS can reasonably handle while maintaining program quality with current levels of instructional resources and facilities. At present, there are some courses that have extremely large enrollments (~ 100 students) and instructors noted challenges with managing such large courses in an online instructional context. There is a need to review and consider projected growth, optimal class size, student-faculty ratio, and other factors that can impact the overall student experience -- particularly in an online instructional environment.

Data provided indicate the the student employment placement rate is high (70-75%) with average salaries of \$45,000/year - figures that compare favorably to other SUS universities. The 2016 revisions to the BSIS program will likely strengthen these numbers given the refocusing of the degree program.

Administration

Administration of the BSIS program is primarily through an Undergraduate Director (Dr. Claudia Cooperman), who also directs the Health Sciences undergraduate program. Dr. Cooperman also contributes to the instructional mission of the School. Additional overall program management is provided by Dr. James (Jim) Andrews, Director of the School of Information. Finally, select faculty have involvement in the design and advising within various concentrations. In effect, this means that there is not a full-time dedicated administrator for the BSIS. If growth of the program continues at its current pace, there will be a need to ensure adequate staffing to administer and oversee the program to ensure the overall quality of the program and positive faculty and student experiences.

In addition to the above, an issue raised/identified during the visit was in regards to the assignment of teaching assistants and support for faculty with large classes/sections. Some faculty raised concerns regarding course enrollments of 100 or more students without TA support. When this issue was raised with the Program and School directors, it seemed that this might be a communication issue between administrators and faculty. All would benefit from a clear articulation and transparent set of policies and procedures regarding faculty and course needs.

Resources and Facilities

The School of Information faces challenges both in terms of resources and facilities. These include:

- A lack of unified and adequate space to meet existing needs. Some faculty currently share office space, and advisors are not co-located with faculty and staff.

- A lack of space for further growth or expansion.
- A lack of instructional space should the School wish to pursue, for example, more blended learning or in-person approaches within the BSIS.
- A lack of resources to develop a more comprehensive marketing and recruitment approach. A particular need is to help students differentiate between and understand the various information technology-related degree programs on campus to facilitate the selection and pursuit of a suited program of study.
- A budgeting approach that lacks incentives for the School to grow the BSIS. This ultimately prevents the School from growing the program in a strategic and planned way.

The School of Information may not be unique within the College of Arts & Sciences regarding the above constraints and/or challenges. Unless addressed, however, the BSIS will likely be unable to reach its full enrollment potential and thus the University unable to produce more graduates with sought after employable skills that meet local and state demand.

Student Learning Outcomes Assessment

The student learning outcomes assessment process for the BSIS program has undergone recent changes and revision. As noted in the *Undergraduate Program Self-Study* document:

- The original learning outcomes assessment process centered on the BSIS program's capstone course.
- With the hiring of a new Undergraduate Program Director in 2017, the learning outcomes assessment approach was reorganized to focus on courses throughout the program at key points in a student's program of study.
- Working with the faculty, the learning outcomes targeted identified core competencies for the BSIS program.

This new approach to student learning outcomes was implemented in 2018, and thus is in its early stages. Review of the student learning outcomes materials included in the appendices of the *Undergraduate Program Self-Study* document corroborate this. Discussions with the Undergraduate Program Director indicate that the revised student learning outcomes approach is more effective and appropriate to the program, but due to its recent revision and adoption, the evaluator was unable to fully assess this aspect of the program. As such, the evaluator recommends that the School conduct an assessment of the outcomes assessment methodology and process during summer 2019 as an interim review to:

- Inform any needed modifications to the process;
- Inform the extent to which the revised outcomes metrics capture articulated student learning outcomes;
- Inform how the captured outcomes data can be used to inform any appropriate course and program modifications; and
- Inform the extent to which the program is meeting its articulated instructional goals.

The results of this review should then serve as input into any adjustments to the program's student learning outcomes assessment process moving forward.

It is also worth noting that student learning is enhanced through student clubs, participation in faculty research projects, the emergence of an internship program that is collaborative with community partners (such as Baycare and the Florida Department of Health).

III. Program Strengths and Weaknesses

The BSIS program has undergone a range of changes since its absorption into the School of Information in 2010. With each set of changes, the program has gained in focus, strength, and alignment with College, University strategic initiatives and regional, state, and national workforce needs.

Specific strengths of the program include:

- A focus on the intersection of people, information, and technology, infused with the values of library and information science. These values foster critical societal goals of inclusion, diversity, and equity of access, as well as a user perspective regarding the design and implementation of information technology, services, and resources;
- A highly relevant curriculum designed to meet a number of workforce needs;
- A desired program that is growing, and could grow further;
- A student body that is increasing in diversity, thus bringing much needed diversity to the information technology workforce;
- A program leadership that has brought focus and organization to the degree program overall, as well as specializations;
- A flexible degree program that meets students “where they are” in terms of ability to enroll in courses and complete the degree;
- Faculty with relevant and appropriate skills and research areas;
- Instructional methods built on the School’s strengths in online delivery; and
- Experiential learning opportunities through internships with community partners.

This list is not exhaustive, but rather serves to articulate and identify several of the program’s strengths identified by the evaluator.

These strengths, however, are counterbalanced by concerns that the evaluator identified. These include:

- The need for appropriate staff and faculty resources to support the program’s current -- and potential -- growth. The School will need additional investment by the College in faculty, staff, and infrastructure to grow.
- The lack of an upper limit on enrollments. It is easy to think that an online program has unlimited growth potential due to its lack of physical space constraints. However, there is a need to set a realistic desired program size (a number of iSchool undergraduate programs have enrollment ranges

between 500 and 700) so as not to overwhelm the School and its ability to maintain program quality.

- A high instructional load for faculty. Given the relatively high instructional load of faculty, it is a challenge for faculty to be more research active. As the expectations for research productivity for faculty grow, there is a need to consider how to balance those increased expectations with high teaching loads. A typical load for research intensive (Preeminent) universities would be four courses per year (2 + 2), with the ability to reduce those loads due to course buyouts from funded research.
- A continuing evolution of the program. All the changes over the last several years have served the program, and students, well. Further, it must be acknowledged that the data, information, health, and technology fields evolve rapidly and thus there is a need to maintain currency. That said, a period of stability would help the School, for example, market the program, develop more relationships with community partners, solidify its student learning outcomes assessment approach, and enhance communication between and among faculty, staff, and others.

Overall, the BSIS program is on solid footing. Addressing the identified weaknesses would position the program for growth that facilitates meeting University strategic goals and workforce needs.

IV. Recommendations

The external evaluator found that the BSIS program is increasingly embraced by the School of Information. The faculty and leadership, especially since 2016, have created a program this is well designed, aligned with University and workforce priorities and needs, strategic in leveraging its location (particularly with the health information and cybersecurity emphases), and poised for growth. Further the existing and recently hired faculty with primary association with the program are well suited to its curriculum, innovative in their instructional approaches, and dedicated to the program's continued and future success.

The evaluator makes the following recommendations based on the above articulated findings:

- The School needs to ensure that there is a fully developed ongoing review and revision process for individual courses, concentrations, and other curriculum matters.
- The School should develop metrics for determining the success of the program, for example, whether concentrations should be expanded or discontinued, and whether the School has the capacity to maintain them.
- The School should further explore ways in which to create more cohesion amongst the faculty with instructional responsibilities in the BSIS program to ensure common purpose and engagement.
- The School should develop and implement a more centralized process and effort to secure internship opportunities and partnerships - which can also benefit faculty research activities.
- The School should conduct an assessment of its revised outcomes assessment methodology and process during summer 2019. Given the newness of the process implemented, it was not possible to fully assess the veracity of the student learning outcomes process and little data were available to review prior to or during the site visit.
- The College and School should work collaboratively to determine an appropriate size of the BSIS program, and ensure that the School receives the faculty lines, infrastructure, and staffing resources to successfully meet the determined student enrollment target. Without such an investment, the BSIS program will not be able to sustain more growth without compromising program quality and an overall positive student experience.
- The College and School should work collaboratively to develop support structures for enhancing and supporting research expectations for faculty. Tenured/tenure track faculty hired within the last several years are well positioned in critical areas of health information, cybersecurity, data science and analytics, and information science. Their research profiles are those of high-quality scholars in their respective fields. Without additional support, which may include reduced teaching loads, however, faculty will be

challenged to increase their research productivity and secure external/competitive grants.

- An enhanced research profile will require reconsideration of a PhD program within the School. Faculty will need access to doctoral students to further their research agendas and climb iSchool rankings.
- The School may also consider welcoming postdocs into the School to collaborate with faculty and possibly recruit new high-quality faculty into the School.

The above recommendations are not exhaustive, but rather designed to highlight key findings and observations from the review.

V. Dean and College Questions

1. Does the School have a plan with identified metrics for monitoring continued improvement in scholarship/research? Are these targets well aligned with university and disciplinary expectations and aspirations?

The evaluation focused on the BSIS program and not an overall departmental review. The material provided using *Academic Analytics*, however, indicates that the faculty compares favorably to peer and aspirational iSchools in terms of research productivity and output in key areas of refereed journal publications and funding. This assessment is based on the methodology(ies) employed by *Academic Analytics*. Further analysis such as citation counts, h-index, and other measures of impact would enhance the assessment provided, but such an assessment was beyond the scope of the BSIS degree program.

In terms of alignment, faculty research areas include health information, cybersecurity, data science and analytics, and information science -- all of which align with University priorities and the broader iSchool domain.

2. Are the current areas of research emphasis appropriate for increasing the scholarly visibility of the program?

As identified in the previous question, faculty are working in key areas such as health information, cybersecurity, data science and analytics, and information science. The research profile of the School will rise further as faculty publish on this topics in regarded and appropriate refereed research journals and professional publication outlets. Further reputational enhancement would occur with faculty securing additional competitive funding from such agencies as NIH, NSF, defense/intelligence agencies, and the Institute of Museum and Library Services.

3. Do School faculty have relationships across the campus that might be used to develop funded interdisciplinary research projects? Could they?

The School has connections across campus that can facilitate interdisciplinary research. The School participates in the University's interdisciplinary Bachelor of Science in Health Sciences degree, has strong ties to the Library, and also has affiliate faculty from both English and Public Health. Faculty members have affiliate appointments outside the School, for example in the Center for Strategic & Diplomatic Studies and Institute for Health Science Information. These can serve as catalysts for collaborative research projects, grants, and other research activities.

4. Does the School have a good process for evaluating and improving instruction?

Regarding the BSIS program, the School continues to evolve its assessment of the instruction delivered for that program. Efforts are overseen by the Director and Undergraduate Director, and include tracking student enrollment, final grades, and student evaluations of instructors and course content. Further analysis of course availability and demand has led to a substantial reduction of the average time to degree completion and an increase in student credit hours. As noted, the student learning outcomes assessment process has been revised and only recently implemented, and thus it is too early to determine its effectiveness. Similarly, the curriculum mapping activities are in development, and it is anticipated that this will further ensure consistency in the program as well as the overall quality of the program's instruction.

5. Does the School have a regular process to evaluate the curriculum and ensuring consistency with disciplinary directions? Does the undergraduate program adequately prepare students for future education or careers?

As noted in previous sections, the School engaged in major revision of the curriculum in 2016. This has led to program growth, a strategic and well-thought out set of concentrations, and successful student placement. The School has linked its program directly to growth careers using a systematic analysis process that includes Bureau of Labor Statistics career data and market analysis. Further, the School has leveraged School and University strengths in its development and growth of the BSIS.

6. Does the program have robust internship opportunities? Are study abroad opportunities offered as an important part of the undergraduate experience?

The School and its faculty have worked to develop internship opportunities, but this continues to be a work in progress that requires resources and investment to develop further. The School does have relationships with Baycare and the Florida Department of Health.

7. Are program assessments appropriate for informing program improvements?

As noted previously, the School continues to build its program assessment approach using multiple methods. As designed, these approaches should provide multiple views of the success of the program, but not all the pieces were in place at the time of the visit.

8. How well does the School connect with its undergraduate and graduate alumni, both to evaluate the success of their preparation and to engage them in the future success of the department?

The BSIS program is relatively new, and has had few graduates to date. Thus at the undergraduate level, the School continues to construct its alumni development process. At the graduate level, particularly for the ALA-accredited MA in Library and Information Science degree program, the connection to alumni is exceptionally strong. The School has a long history and bond with the Florida library community, and has placed many of its graduates in key leadership positions in the profession throughout the state and elsewhere.

9. Does the culture of the School promote collegiality and shared decision making?

The faculty enjoy a strong, open, and collegial working environment. This creates an overall positive climate, and fosters a shared and governance process in which members of the School are invested.

10. Does the School have a process to groom future leadership in order to sustain momentum?

The School has enjoyed consistent, stable, and strong leadership for several years. Combined with University strategic initiatives, an area that is growing economically, and an area that has strong key industries in its area (e.g., health, military, information and data), the School is well positioned to attract top faculty talent at all levels. The School is encouraged to create the Institute of Health Science Information Center for Social Science Informatics and link the creation of those centers to the University's efforts to hire accomplished senior faculty as the inaugural directors of those centers.

11. Is the School well poised to take advantage of the state-wide initiative to hire accomplished faculty at the senior levels? Could they do so in a way that would help enhance their national reputation?

See above (10).

Appendix D: Academic Learning Compact

Department/Program: School of Information

Major: Information Science

Degree Designation: Bachelor of Science

The B.S. in Information Science degree is an interdisciplinary program designed to provide students with a strong theoretical foundation in information science and discipline-specific technical skills that prepare them for success information-related professions. The program's primary focus is on people, information, and technology, and the interactions between them.

Content/Discipline Knowledge & Skills

- Students will describe and apply how people interact with information and technology; the complexities of the information society; knowledge of information creation, storage, and organization applications and theories; information architecture; and related knowledge and skills needed to design, implement, and evaluate new tools and approaches to solving emerging information problems. The areas of focus are dependent upon the students' chosen concentration and each of the concentrations will be assessed for outcomes in their individual area.
 - Information Security – Students will describe and apply the underlying principles, methodologies, and applications for protecting information or data from unauthorized access, use, misuse, disclosure, destruction, modification, or disruption.
 - Data Science - Students will describe and apply the underlying principles, methodologies, and applications for knowledge discovery through data exploration, analysis, and inference.
 - Health Informatics - Students will describe and apply information science principles to the design, development, adoption, and application of IT-based innovations in healthcare services delivery, management, and planning.
 - Web Development Technologies - Students will describe and apply appropriate technologies to create, maintain, and improve functional websites to meet client requirements and users' needs.
 - Intelligence Analysis – Students will describe the structure and function of the U.S. Intelligence Community, explain its core analytic disciplines, and apply analytic methodologies to generate actionable knowledge for critical decisions.
- Students will be able to recognize professional responsibilities and make informed judgements based on legal and ethical principles in information-related professional matters.

Critical Thinking Skills

- Students will be able to analyze a complex, information-related problem, and apply principles of information science and other relevant disciplines to identify, design, implement, and evaluate solutions.

Communication Skills

- Students will be able to communicate effectively in a variety of professional contexts with respect to Information Science-related content.

Assessment of Student Learning Outcome

Appendix D: Academic Learning Compact

Through a variety of mechanisms including core task assessments, examinations, assignments, and capstone experiences School of Information program faculty will measure students' achievement of the identified core learning outcomes. The results of the assessments will be used to improve student achievement and program effectiveness.

Appendix E: Semester Plans

<u>Undergraduate Eight-Semester Plan</u>	
CIP Code: 11.0401	
CIP Title: Information Science/Studies	
Degree Level: B	
Credential (Degree Type): B.S.	
USF Title (Major Name): Information Sciences	

For any course and/or placeholder that must be taken in sequence and/or in the semester listed, please indicate such by inserting a (!) in the appropriate cell.

Fall 1								
!	Current Course Prefix and Number	Common Prerequisite	General Education Requirement	Supporting Course	Major Core	Concentration Course	Unrestricted Elective	Total
	ENC 1101		✓					3
	Mathematics		✓					3
	Humanities		✓					3
	Creative Thinking		✓					3
	XXX XXXX (Recommended: SLS 2901)						✓	3
Take the Civics Literacy Exam (Graduation Requirement)								
Total Semester Credit Hours:								15

Spring 1								
!	Current Course Prefix and Number	Common Prerequisite	General Education Requirement	Supporting Course	Major Core	Concentration Course	Unrestricted Elective	Total
	ENC 1102		✓					3
	STA 2023	✓	✓					3
	Social Sciences		✓					3
	COP 2510	✓						3
	Information and Data Literacy (Recommended: LIS 2005)		✓					3
Total Semester Credit Hours:								15

Summer 1								
!	Current Course Prefix and Number	State Mandated Common Prerequisite	General Education Requirement	Supporting Course	Major Core	Concentration Course	Unrestricted Elective	Total
	Human and Cultural Diversity		✓					3
Total Semester Credit Hours:								3

Fall 2								
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Appendix E: Semester Plans

	Current Course Prefix and Number	State Mandated Common Prerequisite	General Education Requirement	Supporting Course	Major Core	Concentration Course	Unrestricted Elective	Total
	MAD 2014	✓						3
	Natural Sciences		✓					3
	COP 2250	✓						3
	XXX XXXX						✓	3
Total Semester Credit Hours:								12

Spring 2								
	Current Course Prefix and Number	State Mandated Common Prerequisite	General Education Requirement	Supporting Course	Major Core	Concentration Course	Unrestricted Elective	Total
	COP 2700	✓						3
	XXX XXXX						✓	3
	XXX XXXX						✓	3
	XXX XXXX						✓	3
Total Semester Credit Hours:								12

Summer 2								
	Current Course Prefix and Number	State Mandated Common Prerequisite	General Education Requirement	Supporting Course	Major Core	Concentration Course	Unrestricted Elective	Total
	XXX XXXX						✓	3
	XXX XXXX						✓	3
Total Semester Credit Hours:								6

Fall 3								
	Current Course Prefix and Number	State Mandated Common Prerequisite	General Education Requirement	Supporting Course	Major Core	Concentration Course	Unrestricted Elective	Total
	LIS 3261				✓			3
	LIS 3353				✓			3
	ENC 3249				✓			3
	XXX XXXX					✓		3
	XXX XXXX					✓		3
Total Semester Credit Hours:								15

Spring 3								
	Current Course Prefix and Number	State Mandated Common Prerequisite	General Education Requirement	Supporting Course	Major Core	Concentration Course	Unrestricted Elective	Total
	LIS 4204				✓			3
	XXX XXXX					✓		3
	XXX XXXX					✓		3
	XXX XXXX Upper-Level						✓	3

Appendix E: Semester Plans

Total Semester Credit Hours:	12
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Summer 3							
Current Course Prefix and Number	State Mandated Common Prerequisite	General Education Requirement	Supporting Course	Major Core	Concentration Course	Unrestricted Elective	Total
Recommendation: Research Opportunity (IDS 4914) or Study Abroad							0
Total Semester Credit Hours:							0

Fall 4							
Current Course Prefix and Number	State Mandated Common Prerequisite	General Education Requirement	Supporting Course	Major Core	Concentration Course	Unrestricted Elective	Total
LIS 4414 (Ethical Reasoning and Civic Engagement)		✓		✓			3
XXX XXXX					✓		3
XXX XXXX					✓		3
XXX XXXX Upper-Level						✓	3
XXX XXXX Upper-Level						✓	3
Total Semester Credit Hours:							15

Spring 4							
Current Course Prefix and Number	State Mandated Common Prerequisite	General Education Requirement	Supporting Course	Major Core	Concentration Course	Unrestricted Elective	Total
LIS 4934 (High Impact Practice)		✓		✓			3
XXX XXXX					✓		3
XXX XXXX Upper-Level						✓	3
XXX XXXX						✓	3
XXX XXXX						✓	3
Total Semester Credit Hours:							15

Total Program Hours:	120
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Appendix E: Semester Plans

<u>Undergraduate Four-Semester Plan</u>	
CIP Code: 11.0401	
CIP Title: Information Science/Studies	
Degree Level: B	
Credential (Degree Type): B.S.	
USF Title (Major Name): Information Sciences	

For any course and/or placeholder that must be taken in sequence and/or in the semester listed, please indicate such by inserting a (!) in the appropriate cell.

Fall 1								
!	Current Course Prefix and Number	State Mandated Common Prerequisite	General Education Requirement	Supporting Course	Major Core	Concentration Course	Unrestricted Elective	Total
	LIS 3261				✓			3
	LIS 3353				✓			3
	ENC 3249				✓			3
	XXX XXXX					✓		3
	XXX XXXX					✓		3
Total Semester Credit Hours:								15

Spring 1								
!	Current Course Prefix and Number	State Mandated Common Prerequisite	General Education Requirement	Supporting Course	Major Core	Concentration Course	Unrestricted Elective	Total
	LIS 4204				✓			3
	XXX XXXX					✓		3
	XXX XXXX					✓		3
	XXX XXXX Upper-Level						✓	3
Total Semester Credit Hours:								12

Summer 1								
!	Current Course Prefix and Number	State Mandated Common Prerequisite	General Education Requirement	Supporting Course	Major Core	Concentration Course	Unrestricted Elective	Total
Recommendation: Research Opportunity (IDS 4914) or Study Abroad								0
Total Semester Credit Hours:								0

Fall 2								
!	Current Course Prefix and Number	State Mandated Common Prerequisite	General Education Requirement	Supporting Course	Major Core	Concentration Course	Unrestricted Elective	Total
	LIS 4414 (Ethical Reasoning and Civic Engagement)		✓		✓			3

Appendix E: Semester Plans

	XXX XXXX					✓		3
	XXX XXXX					✓		3
	XXX XXXX Upper-Level						✓	3
	XXX XXXX Upper-Level						✓	3
Total Semester Credit Hours:								15

Spring 2								
	Current Course Prefix and Number	State Mandated Common Prerequisite	General Education Requirement	Supporting Course	Major Core	Concentration Course	Unrestricted Elective	Total
	LIS 4934 (High Impact Practice)		✓		✓			3
	XXX XXXX					✓		3
	XXX XXXX Upper-Level						✓	3
	XXX XXXX						✓	3
	XXX XXXX						✓	3
Total Semester Credit Hours:								15

Total Program Hours:								60
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Appendix F: Faculty CVs

**UNIVERSITY OF SOUTH FLORIDA
SCHOOL OF INFORMATION (ISCHOOL)**

ABBREVIATED FACULTY CVs

Richard Austin

Education

Ph.D., Information Studies	Florida State University
M.A., Library and Information Science	University of South Florida
M.B.A., Business Administration	Lehigh University
B.S., Mineral Economics	The Pennsylvania State University

Academic & Professional Experience

Senior Instructor (Instructor II), University of South Florida	May 2016 - Present Undergraduate
Program Director), University of South Florida	2012 – May 2016
Instructor (Instructor I)), University of South Florida	December 2012 – May 2016 Visiting
Assistant Professor), University of South Florida	Aug 2010 – December 2012
Adjunct Instructor, University of South Florida	Spring 2005 – Summer 2010
Technology Consultant), University of South Florida	Summer 2009:
Interim Advisor/ Tech Coordinator, University of South Florida	Summer 2007 – Fall 2007
Technical Consultant, University of South Florida	Summer 2006 - Fall 2006
Graduate Assistant, University of South Florida	Summer 2004 – Spring 2005
Teaching / Graduate Assistant, Florida State University	Fall 2002 – Spring 2004
Teaching / Graduate Assistant, University of South Florida	Spring 2002 – Summer 2002
Reference Graduate Assistant, University of South Florida RRC	Spring 2001 – Fall 2001
Computer Support Specialist, , University of South Florida CAS	Summer 1999 – Fall 2000
Graduate Assistant / Business Analyst, Lehigh University	1993-1995

Current Membership in Professional Organizations

- Association for Information Science and Technology (ASIST).
- American Library Association (ALA).
- Member Beta Phi Mu, Beta Phi Chapter (University of South Florida).
- Past secretary Florida chapter of American Society for Information Science and Technology (ASIST).
- Past president and treasurer of USF student chapter of American Society for Information Science and Technology (ASIST).

Honors and Awards

- Beta Phi Mu, 2003, International Library and Information Science Honor Society.

Select Publications & Presentations from the Past Five Years

- “Technology in Public Libraries: An Overview of the Past, Present, and Future” (with Diane Austin) in Introduction to Public Libraries (3rd Edition) edited by: Kathleen de la Peña McCook and Jenny S. Bossaller. ALA Neal-Schuman (2018).

- “Once Upon a Time in Cyberspace: A Digital Storytelling Primer” (with Diane Austin), Florida Association for Media in Education (FAME) 2018 Annual Meeting, Orlando, FL, November 28 - 30, 2018.
- “E-Portfolios: Creating Your Digital Story” (with Diane Austin), Florida Association for Media in Education (FAME) 2014 Annual Meeting, Orlando, FL, October 9 - 10, 2014.
- “Preparing for the Careers That Don’t Exist Yet 2.0” (with Diane Austin and Nardia Cumberbatch), Florida Association for Media in Education (FAME) 2013 Annual Meeting, Orlando, FL, November 22 - 23, 2013.

University & Departmental Service Activities

- Director of Undergraduate Program: 2012-2016
- Chair of the Undergraduate Program Curriculum Subcommittee: 2012-2016
- Chair of Departmental Curriculum Committee: Fall 2013-Summer 2015
- Member of Departmental Curriculum Committee: 2012-Summer 2013, 2015
- Member of Departmental Master’s (MLIS) Program Committee: 2016-2017
- Member of the COA Program Planning Group for Curriculum: 2014-2016
- Member of Departmental Faculty Affairs Committee: Fall 2017-Present
- Member of the College of Arts & Sciences Advisory Board of Undergraduate Directors: 2014-2016
- Member Departmental Search Committee: 2011 (hired Dr. Heiko Haubitz) Member
- Departmental Search Committee: 2013 (hired Dr. Alon Friedman) Member
- Departmental Search Committee: 2015 (hired Denise Shereff, MLIS) Member
- Departmental Search Committee: 2017 (hired Dr. Donna D’Ambrosio) Chair
- Departmental Search Committee: 2019 (hired Dr. Vanessa Reyes)

Diane Austin

Education

Ph.D. Coursework, Curriculum and Instruction	University of South Florida
M.Ed., Instructional Systems	Pennsylvania State University
B.S., Accounting	Pennsylvania State University

Academic & Professional Experience

Instructor III, University of South Florida	2016-Present
Coordinator of School Media & Youth Services	2016-2017
Associate Director SI, University of South Florida	2014-2015
Instructor II, University of South Florida	2012-2015
Assistant Director SI, University of South Florida	2009-2014
Instructor I, University of South Florida	2009-2012
Instructor/DL Spec, University of South Florida	2000-2009
Asst in Instructional Design, USF	1999-2000
Training Spec, Productivity Point Int'l	1997-1999
Educational Consultant, Contractor	1996-1998

Membership in Professional Organizations

- American Society for Information Science and Technology (ASIS&T)
- Florida Association for Media in Education (FAME)
- Special Libraries Association

Publications

- "Technology in Public Libraries: An Overview of the Past, Present, and Future" (with Richard J. Austin) in *Introduction to Public Libraries* (3rd Edition) edited by: Kathleen de la Peña McCook and Jenny S. Bossaller. ALA Neal-Schuman (2018).
- Gregory, V., and D. Austin. "Interaction, Communication and Information Needs: A Virtual Community of Library and Information Science Students and Faculty". *Web-Based Communities Proceedings of the IADIS International Conference*. Algarve Portugal: International Association for the Development of the Information Society, 2005
- Gregory, V., and D. Austin. "Connecting Students at a Distance: Designing and Implementing a Virtual Community". *Web-Based Communities Proceedings of the IADIS International Conference (edited by Piet Kommers, Pedro Isáias, and Miguel Baptista Nunes)*. Lisbon Portugal: International Association for the Development of the Information Society, 2004. 500-503

Departmental and University Service Activities

- Faculty Affairs Committee
- Curriculum Committee, including actively serving on subcommittees (Youth Services and School Media, Information Science and Technology, Undergraduate)
- Communications and Distance Learning Committee (Past-Chair)
- Student Affairs Committee
- Planning and Assessment Committee
- School's Reaccreditation Committee (ALA)
- Chair, faculty and staff search committees
- Webmasters Committee
- Computer Committee, CAS

Kiersten Cox

Education

M. S., Library and Information Science	University of Hawai'i, 1996
M.A., International Affairs – SE Asia	Ohio University, 1992
B.S., Secondary Education	Ohio University, 1988

Academic & Professional Experience

Master Instructor, University of South Florida	2003-Present
Coordinator, University of South Florida	1998-2003
Resource Coordinator, Cancer Research Center of HI	1994-1996
Librarian, Lending Collection Honolulu Art Museum	1992-1996
Librarian, SE Asia Collection, Ohio University	1990-1992

Honors and Awards

- Beta Phi Mu The International Library and Information Studies Honor Society
- Phi Alpha Theta History Honor Society

Current Membership in Professional Organizations

- American Library Association
- Association of College and Research Libraries
- Southeastern Library Association
- Informing Science Institute

Select Publications from the Past Five Years

- Gregory, V. & Cox, K. (2013). Implications of voluntary communications based on gender, education level and cultural issues in an online environment. *Issues in Information Science and Information Technology*, 10. 227-239.
- Cox, K. & Scholz, J., (2016). Word cloud sushi. In N. Fawley, & N. Krystal (Eds.), *The Discovery Tool Cookbook: Recipes for Successful Lesson Plans*. Chicago: American Library Association.
- Gregory, V. L., & Cox, K., (2016). Must printed books become a thing of the past in academic libraries? *The International Journal of the Book*, 14(4). pp. 11-19.
- Gregory, V. L., & Cox, K., (2017) Remember when ebooks were all the rage? A look at student preferences for printed versus electronic text. *Proceedings of the Informing Science and Information Technology Education Conference, Vietnam*, pp. 77-83. Retrieved from <http://www.informingscience.org/Publications/3731>

Professional and University Service Activities

Professional Service

- Library Education Committee, Southeastern Library Association
- Membership Committee, Special Libraries Association
- Leadership Committee Delta Kappa Gamma International Society for Key Women Educators

University Service

- USF College of Arts and Sciences Technology Committee
- School of Information Library and Information Science Faculty Committee

Alon Friedman

Education

Ph.D., Information Science	Long Island University, Palmer School, 2007
M.A., Mass Communication	University of Florida, 1994
B.S., Advertising	University of Florida, 1993

Academic & Professional Experience

Associate Professor, University of South Florida	2019-Present
Assistant Professor, University of South Florida	2013-2019
Adjunct Professor, St. John's University	2011-2013
Adjunct Professor, The Laboratory Inst. of Merchandising	2011-2012
Adjunct Lecturer, Long Island University	2005-2012
Adjunct Professor, Seton Hall University	2007-2009
Adjunct Professor, University at Albany	2008-2009
Adjunct Lecturer, Metropolitan College in New York	2004-2007

Current Membership in Professional Organizations

- Institute of Electrical and Electronics Engineers (IEEE)
- The R Foundation
- The Semiotics Society of America

Select Publications from the Past Five Years

- Friedman, A. "Statistics for Library & Information Services: A Primer for Using Open Source R Software for Accessibility and Visualization. New York Published by Rowman & Littlefield, 2016.
- Friedman, A. "R (software application)." SAGE Encyclopedia of Research, Measurement and Evaluation. Editor: Frey, B, 2017
- Friedman, A. "Data Science syllabi measuring its content." Education and Information Technologies. (25), 2019.
- Friedman, A. "Visual Uncertainty Models Through the Political Lens of the Visual Arts in the Era of Bush and Trump." Journal of Visual Literacy (JVL), 2019.
- Friedman, A. "Toward peer-review software and a rubric application in visual analytics classes: A case study. Education for Information: Special Issue: Visual Learning. IOS Press, 2019.
- Friedman, A. "Digitizing Peircean semiotics to analyze student peer review: classroom use of an application in open source R." Social Semiotics 38(5), 2018.
- Friedman, A. & E. Schneider. "Developing a visualization education curriculum in the age of Big Data using the Dick and Carey model." Visual Communication Quarterly 25(4), 2018.

- Friedman, A. & S. Ron. "Unlocking the power of visual grammar theory: Analyzing social media political advertising messages in the 2016 U.S. election" *Journal of Visual Literacy* 36(1), 2017. [ERA* Ranking: A]
- Friedman, A. "Measuring the Promise of Big Data Syllabi." *Technology, Pedagogy and Education* 26(3), 2017. [ERA* Ranking: B]
- Friedman, A. & Bernstein, J. "Measures of greatness: A Lotkaian approach to literary authors using OCLC WorldCat." *Library and Information Science Research*. 39(3), 2017. [ERA* Ranking: A]
- Friedman, A. & Feichtinger, E. "Peirce's open source package in R." *Signs: International Journal of Semiotics* 8(1), 2017.
- Friedman, A. "The Power of Lotka's Law Through the Eyes of R." *The Romanian Statistical Review*. Vol 2 pp. 69-79, 2015.
- Friedman, A. "The relationship between research methods and visual display: a study of conference proceedings in the field of knowledge organization." *Information Research Journal* Vol. 19(4), 2014. [ERA* Ranking: B]

Professional and University Service Activities

Professional Service

- Peer Reviewer, *Journal of the American Society for Information Science and Technology*
- Peer Reviewer, *Journal of Information Visualization*
- Peer Reviewer, *Journal of Big Data*
- Peer Reviewer, *Journal of Documentation*
- Peer Reviewer, *Knowledge Organization Journal*

University Service

- USF School of Information: Undergraduate Studies Committee
- USF Mass Communication Department: Search committee for new chair Committee
- USF School of Information: Search committee for new faculty Committee
- USF School of Information: Admissions, Standards, and Honors committee
- USF Provost Office: Data Science Curriculum Committee
- USF School of Information: Undergraduate Curriculum Committee
- USF School of Information: Faculty Affairs Committee
- USF School of Information: Search Committee
- USF School of Information: Curriculum Committee
- USF Big Data Tools Colloquium: Tools for writers. Colloquium committee

Research Funding Awards

- Titled: NSF CMMI CAREER proposal (2018)
Agency: USF CAS Research
Role: PI
Funding: \$1000
Travel for NSF Writing Proposal Workshop
- Titled: Development of Visual Peer Review. (2017)
Agency: USF Research & Innovation
Role: PI
Funding: \$3,000
- Titled: Developing Visual Literacy curriculum for undergraduate USF. (2017)
Agency: USF Academy for Teaching and Learning Excellence (ATLE)
Role: PI
Funding: \$1000

John Gathegi

Education

JD-Juris Doctor, Law	University of California at Berkeley, 1996
Ph.D., Library & Information Studies	University of California at Berkeley, 1990
M.A., Political Science	University of California at Berkeley, 1987
Adv. Cert., Library & Info. Studies	University of California at Berkeley, 1984
MLS, Mass Comm/Media Studies	University of California at Berkeley, 1983
B.A., Psychology	U.S. International University, 1980

Academic Experience

Professor, University of South Florida	2009-Present
Visiting Professor, USF School of Mass Comm	2009-Present
Director, School of Information	2007-2009
Associate Professor, University of South Florida	2007-2009
Associate Professor, Florida State University	2002-2007
Dean, Hum, Arts & Soc Sci, Merritt College	2000-2002
Asst. Dean of Instruction, Merritt College	2000-2002
Adjunct (SJ State, Vista Coll, SF City Coll, Merritt Coll)	1994-1999
Assistant Professor, Florida State University	1991-1994
Visiting Assistant Professor, Florida State University	1990-1991
Reader/Instructor, University of California at Berkeley	1989-1990

Membership in Professional Organizations

- Institute of Museums and Library Services (IMLS)
- Florida Library Association
- Association of Library and Information Science Education
- Tampa Bay Library Consortium, Inc.
- Association of Library and Information Science Education (ALISE)
- American Association of Law Libraries
- American Society for Information Science and Technology
- Information Policy Special Interest Group (SIG IFP)
- American Bar Association
- Association for Computing Machinery

Honors and Awards

- Fulbright Senior Specialist, Justice Studies Center of the Americas, Santiago, Chile (2004)
- Phi Beta Kappa (Doctoral invitee). Alpha of California
- Louise Patterson Award

- Rocca Scholar. University of California at Berkeley
- Doctoral Fellowship. University of California at Berkeley
- Doctoral Fellowship. University of California at Berkeley
- James B. Grubb Scholarship
- Institute of International Studies Scholarship. University of California
- NewHouse Foundation Scholarship
- NewHouse Foundation Scholarship
- Beta Phi Mu

Select Publications

- Phelps, Daniel C. and John N. Gathegi. Information System Security: Self-Efficacy and Implementation Effectiveness. Accepted, Journal of Information Systems Security
- Gathegi, John N. The Digital Librarian's Legal Handbook. New York: Neal-Schuman, (2014).
- Workman, Michael, Daniel C. Phelps, and John N. Gathegi. *Information security for managers*. Jones & Bartlett Publishers, 2012.
- Gathegi, John N. and Darrell E. Burke. Convergence of Information and Law: A Comparative Study Between i-Schools and Other ALISE Schools. Journal of Education in Library and Information Science 49:1 (2008): 1-22
- Gathegi, John N. Intellectual Property, Traditional Resources Rights, and Natural Law: A Clash of Cultures. International Review of Information Ethics, 7 (2007): 1-7.
- Gathegi, John N. and Peter Mwathi. Creating a Needs-Responsive LIS Curriculum in a Developing Country: A Case Study from Kenya. International Information and Library Review 39 (2007): 134-144.
- Workman, Michael and John N. Gathegi, "Punishment and Ethics Deterrents: A Study of Insider Security Contravention." Journal of the American Society for Information Science and Technology 58:2 (2007): 212-222.
- Gathegi, John N., "Officially-Mandated Disappearing Information: The Legal Depublication Phenomenon." Government Information Quarterly 22 (2005): 423- 439.

Select Professional and University Service Activities

- Tenure packet reviewer for other universities
- Reviewer, Information Security Journal
- Reviewer, Information Systems Security
- Reviewer, International Journal of Internet and Enterprise Management
- Advisory Board of Directors Member, Uhuru Open, Inc.
- Charter Rotarian, Rotary International Tallahassee Southside
- Reviewer, Government Information Quarterly
- Reviewer, Library Quarterly
- Reviewer, Library High Technology Journal
- School Representative/Graduation Marshall, Florida State University Commencement Exercises

- Visitor/Counselor, Hispanic Immigrant Farm Workers, Tallahassee, FL
- Forced Migration and Refugee Studies: Refugee and Asylum Law in the United States. (SYA International Migration & Migrant Dislocation), Guest Lecturer, Department of Sociology, Florida State University
- Media Law. (PUR 3100 Writing for Public Relations), Guest Lecturer, College of Communications, Florida State University
- President, Board of Directors, African Immigrant and Refugee Services, San Francisco/Oakland, CA
- Chair, Coalition for African Immigrants and Refugees in the United States, Oakland, CA
- Member, World Affairs Council of Northern California. San Francisco, CA
- Delegate, California Delegate to the National Summit on Africa, Washington, DC

Research Funding Awards

- All Children's Hospital. Graduate Assistantships. Continuing. Project Cumulative total: \$199,878
- H. Lee Moffitt Cancer Center. Graduate Assistantships. Continuing. Cumulative total: \$25,000
- Access to Legal Information. Fulbright Senior Specialist Program. Judicial Studies Center of the Americas, Santiago, Chile, 2004. \$9,459
- Legal Informatics in the Engineering Context. Information Policy and Management Institute, Florida State University. 2005, \$7,500
- Council on Research and Creativity. Florida State University. Summer Research Award, 1992. \$10,000

Loni Hagen

Education

Ph.D. Information Science University at Albany SUNY, 2016
Ph.D. course work, Information Studies (specialized in Information Law)
University of Tokyo (Japan), 2004-2005
M.A.S. Information Studies (specialized in Information Law) University of Tokyo (Japan), 2004
M.A. Advertising and Public Relations Yonsei University (Korea), 2003
B.A., Law Korean National Police University (Korea), 1996

Academic & Professional Experience

Assistant Professor, University of South Florida 1996-present

Current Membership in Professional Organizations

- Association for Information Science and Technology (ASIS&T)
- Digital Government Society

Honors and Awards

- Best Management Paper Award, the 20th Annual International Conference on Digital Government Research 2019
- Distinguished Dissertation Award, College of Engineering and Applied Sciences, University at Albany, SUNY 2016

Select Publications from the Past Five Years

- **Hagen, L.**, Keller, T. E., Luna Reyes, L. F., and Zhao, X. (in press), Open Data Visualizations and Analytics as Tools for Policy-Making, *Government Information Quarterly*, Impact factor: 4.311
- Yoon, J., **Hagen, L.**, Andrews, J., Scharf, R., Keller, T., & Chung, E. (2019), Impact of Multimedia Tweets in Health Communications: An analysis of Tweets on Zika Virus, *Information Research*, 24(2). Impact factor: 0.574
- **Hagen, L. (2018)**, Content Analysis of E-petitions with Topic Modeling: How to Train and Evaluate LDA Models?, *Information Processing & Management*, 54(6), 1292-1307, Impact factor: 3.444
- **Hagen, L.**, Keller, T., Neely, S., DePaula N., & Cooperman, C. (2018), "Crisis Communications in the Age of Social Media: A Network Analysis of Zika Related Tweets," *Social Science and Computer Review*, 36(5), 523-541, Impact factor: 3.253. Cited in Wikipedia page on "2015—16 Zika virus epidemic," Sage attention score: in the top 25% of all research outputs scored by Altmetric, mentioned by nine tweeters and 1 Wikipedia page (<https://sage.altmetric.com/details/24441935>)

- Jun, D., Kim, D., & **Hagen, L. (2017)**, The Impact of Mobile Social Media Use on User’s Emotional Status, *Journal of the Korean Association for Regional Information Society*, 20(2)002, written in Korean.
- **Hagen, L.**, Harrison, T. M., Uzuner, Ö., May, W., Fake, T., & Katragadda, S (2016). “E-petition popularity: Do linguistic and semantic factors matter?,” *Government Information Quarterly*, 33(4), 783–795, Impact factor: 4.311

Book Chapters:

- **Hagen, L.**, Harrison, T. M., Dumas, C. (2018), “Text Analytics for Policy Analysis,” **Book chapter for Policy Analytics, Modelling, and Informatics: Innovative Tools for Solving Complex Social Problems, Springer.** ISBN 13: 978-3319617619
- Dumas, C., Harrison, T. M., **Hagen, L.**, & Zhao, X. (2017). What Do the People Think?: E-Petitioning and Policy Decision Making. In A. A. Paulin, L. G. Anthopoulos, & C. G. Reddick (Eds.), *Beyond Bureaucracy* (pp. 187–207). Springer International Publishing. ISBN: 978-3-319-54141-9; 978-3-319-54142-6 https://doi.org/10.1007/978-3-319-54142-6_12

Professional and University Service Activities

Professional Service

- Program Committee, International Conference on Digital Government Research

University Service

- USF iSchool Faculty Affairs Committee

Research Funding Awards

- 지능정보 사회 도래에 따른 공공부문의 역할과 과제 (Setting the Agenda regarding the Role of the Public Sector on Intelligent Society), The National Research Foundation of Korea Grant, PI: Dong Wook Kim (Seoul National University, Korea), Role: co-investigator (**\$1.6 million**)--The goal of the project is to investigate the role of the public sector in response to the rise of Artificial Intelligence.

Hong Huang

Education

Ph.D., Library and Information Science	Florida State University, 2010
M.S., Computer Science	Florida State University, 2005
M.S., Plant Genetics	Florida A&M University, 2001
B.S., Biochemistry	Sun Yetsen University, 1996

Academic & Professional Experience

Associate Professor, University of South Florida	2015-Present
Assistant Professor, University of South Florida	2010-2015

Current Membership in Professional Organizations

- Association for Information Science and Technology (ASIS&T) 2010-present
- American Library Association (ALA) 2010-present

Select Publications from the Past Five Years

- **Huang H.,** Tse S., Chu S., Xiao X., Lam J., Ng R., Hui S. (2019). The correlation between out-of-school and in-school reading resources with primary school students' reading attainment. (In press). *Information Research*. [ISI Impact Factor: 0.84].
- Huang H. (2018). Unraveling scientists' multiple data roles dealing with genomic data. (<https://doi.org/10.1002/pr2.2018.14505501135>). *Proceeding of the American Society for Information Science & Technology*, Vancouver, Canada.
- Huang H. (2017). Big data to knowledge— harnessing semiotic relationships of data quality and skills in genome curation work. (10.1177/0165551517748291). *Journal of Information Science*. [ISI Impact Factor: 1.37].
- **Huang H.,** Chu S.K., Liu Y.Y., and Zheng Y. (2017). Understanding user-librarian interaction types in academic library microblogging: A comparison study in Twitter and Weibo. (doi.org/10.1016/j.acalib.2017.06.002). *Journal of Academic Librarianship*. [ISI Impact Factor: 1.18].
- Huang H. (2015). Domain knowledge and data quality perceptions in genome curation work. *Journal of Documentation*, 71 (1), 116-142. [ISI Impact Factor: 1.40].
- **Huang, H.,** Jørgensen, C., & Stvilia, B. (2015). Genomics data roles, skills, and perception of data quality. *Library & Information Science Research* (doi:10.1016/j.lisr.2014.08.003). [ISI Impact Factor: 1.52].
- **Huang H.,** Chu S.K., & Chen D.Y. (2014). Interactions between English-speaking and Chinese-speaking users and librarians on Social Networking Sites. *Journal of the American Society for Information Science and Technology* (DOI: 10.1002/asi.23251). [ISI Impact Factor: 2.11].

- **Huang H., Apouey B., & Andrews J. (2014).** Racial and ethnic disparities in awareness of genetic testing among online users: Internet use, health knowledge and socio-demographics correlates. *Journal of Consumer Health on the Internet*, 18(1), 15-30.

Professional and University Service Activities

- Associate Editor, *Information and Learning Science (Emerald Publishing)*, 2018-
- Editorial Board Member:
 - *Library & Information Science Research (Elsevier Publishing)*, 2017-
 - *Online Information Research (Emerald Publishing)*, 2014-

Vanessa Reyes, Ph.D.

Education

Ph.D., Library and Information Science	Simmons College, 2016
M.S., Library and Information Science	Florida State University, 2011
Graduate Certificate, Information Architecture	Florida State University, 2011
B.A., English	Florida International University, 2010
Undergraduate Certificate, Women's Studies	Florida International University, 2010

Academic & Professional Experience

Instructor, University of South Florida	2019-Present
Adjunct, University of South Florida	2018-2019
Adjunct, Simmons College	2017-2019

Current Membership in Professional Organizations

- American Library Association (ALA)
- Association for Library and Information Science Education (ALISE)
- Society of American Archivists (SAA)

Honors and Awards

- Archival Education and Research Institute (AERI) Scholarship 2015-2016
- The Emily Hollowell Research Grant, Awarded by Simmons College 2014-2015

Select Publications from the Past Five Years

Reyes, V. (2020, April). *Saving Our Digital Past, Present, and Future: A Step-By-Step Guide* Harmon, Charles (Ed.). New York, NY: Rowman & Littlefield Publishers.

Shuster, K. & Reyes, V. (Fall 2020) Manage Your Data: Information Management Strategies for Digital Humanities Practitioners, Dunn, S. & Shuster S. (Eds.). *The Routledge Handbook of Digital Humanities Research*.

Reyes, V. (2019, December). [Review of the book *Digital Citizenship in a Datafied Society* by, Hintz, Dencik, Wahl-Jorgensen. *The International Journal of Diversity, & Inclusion*.

Schuster, K. & Reyes, V. (2018). Food for thought: Metaphors and literacy in digitally mediated social networks. *The Digital Self*. Department of Digital Humanities and Culture, Media and Creative Industries Workshop, King's College London.

Reyes, V. & Schuster, K. (2017) "How Accessible and How Visible Are Diverse Personal Collections? Exploring the Visibility and Accessibility of Cultural Heritage Collections." *The American Archivist SAA*. (In progress for publication in 2018)

- Reyes, V. (2017) Interview with Mike Ashenfelder Library of Congress, *Preservation Digital Technology & Culture*. Volume 45, Issue 4 (January 2017)
- Reyes, V. (2016) *Personal Information Management: A Study of the Practical Aspects of Archiving Personal Digital Information* (Unpublished doctoral dissertation). Simmons College, Boston, MA.
- Reyes, V. (2016) "Understanding the fundamental processes of personal information management, a comparison of academic's personal archiving methods to the dcc digital curation lifecycle model." *iConference 2016 Proceedings*.
- Reyes, V. (2015) Currents & Comments, *Preservation Digital Technology & Culture*. Volume 43.1-44.4, (2014-2016)
- Reyes, V. (2015). Conference Spotlight: The Personal Digital Archiving Conference, April 24– 26, 2015, New York, NY, USA. *Preservation, Digital Technology & Culture*, 44(3).
- Oh, K.E; Reyes, V. (2015) What's in Your Office? A Study on How Academics Manage their Personal Digital Information and Personal Paper-Based Information in their Digital Work Space, *The Signal Digital Preservation Blog: The Library of Congress*. (Online).
- Reyes, V. (2015) Interview with Cathy Marshall, *Preservation Digital Technology & Culture*. Volume 43, Issue 2 (July 2015)

Professional and University Service Activities

Professional Service

- ALISE Gender SIG Webinar Presenter
- ALISE Conference Jury Paper Reviewer

University Service

- Community Engagement Committee School of Information
- Equity, Diversity and Inclusion Committee School of Information

Research Funding Awards

- Simmons College Presidential Student Research Fund
2015-2016 Doctoral dissertation research funding award

Denise Shereff

Education

Ph.D. student, Curriculum and Instruction with a concentration in Instructional Technology	University of South Florida, Expected 2022
MLIS, Library and Information Science	University of South Carolina, 2002
B.A., Foreign Languages with Teaching Certification	Austin Peay State University, 1991

Academic & Professional Experience

Instructor II, University of South Florida	2018-Present
Instructor, University of South Florida	2015-2018
Visiting Instructor, University of South Florida	2014-2015
Academic Services Administrator, University of South Florida	2013-2014
Health Information and Communications Officer, Pediatrics Epidemiology Center, University of South Florida	2009-2013

Current Membership in Professional Organizations

- Medical Library Association
 - Liaison to the Education Hub
 - Consumer and Patient Health Information Section
 - Medical Informatics Section
 - Medical Library Education Section
- Southern Chapter, Medical Library Association
- Florida Health Science Library Association
- Tampa Bay Medical Library Network, Individual Membership
- Florida Library Association
- Suncoast Information Specialists
- Association for Library and Information Science Education
- Association for Educational Communications and Technology

Honors and Awards

- Beta Phi Mu, International Library and Information Studies Honor Society
- Kappa Delta Pi, Education Honor Society
- National Library of Medicine, *BioMedical Informatics MBL/NLM Course Fellow. Marine Biological Laboratory Certificate, Spring Course, 2010.*
- Medical Library Association, *Academy of Health Information Professionals (AHIP), Distinguished Level, 2014-2019.*

- Phi Kappa Phi Honor Society
- Sigma Delta Pi, National Collegiate Hispanic Honor Society

Select Publications from the Past Five Years

Shereff, D., Palmer, R., & Cannon, P. (2017). Every Reader Her Book: Creation of a Therapeutic Library at a Women's Residential Treatment Facility. *Journal of Hospital Librarianship*, 17(1), 42-52. doi:10.1080/15323269.2017.1259444.

Andrews, J., & Shereff, D. (2014). Information Retrieval. In J. Huber & F. Tu-Keefner (Eds.), *Health Librarianship: An Introduction: Libraries Unlimited*.

Professional and University Service Activities

Professional Service

- Member, USF School of Information and Tampa Bay Library Consortium, *Very Important Paraprofessional (VIP) planning committee*, 2015-2018.
- Member, Florida Literacy Coalition, *Health Literacy Summit Planning Committee*, 2013 – present.

University Service

- Chair, USF School of Information, Planning and Assessment Committee, 2019-Present.
- Member, USF School of Information, *Curriculum Committee*, 2014 – Present.
- Faculty Advisor, *Student Organizations of Library and Information Science*, 2013 – 2015.
- Chairperson, USF School of Information, *Admissions, Standards and Honors Committee*, 2015-2018.

Research Funding Awards

NIH UG4LM012340, Subaward 1600679

Fiscal Year: 2019-2020

This project proposes to develop a mental health literacy program designed for the pediatric patients in a crisis center in Florida using four tracks of bibliotherapy texts to deliver personalized bibliotherapy services to build mental health literacy skills. The program will integrate the health resource center's therapeutic collection with those outreach resources and activities available through the National Library of Medicine's eresource pages.

Role: Key personnel

IMLS SP-02-16-0036-16

Fiscal Year: 2016-2017

The major goal of this project was to develop a mental health literacy (MHL) services program to benefit residents of a local drug treatment center in the Tampa Bay Area.

Role: Administrator

15-LSTA-B-03

Fiscal Year: 2015-2016

“Every Reader her Book: Creation of a Therapeutic Library at a Women's Residential Treatment Facility”

The major goal of this project was to create a library and implement library services for the women residents of the Drug Abuse Comprehensive Coordinating Office, Inc. (DACCO) facility, a drug treatment center in Hillsborough County, Florida. Role: Project Manager

Role: PI / Project Manager

John Sullivan

Education

Ph.D., Management of Information Systems [University](#) of Bradford, 2007
M.S., [Information Systems Science](#) [Salve Regina University](#), 1992
B.S., [Business Management](#) [Salve Regina College](#), 1985

Academic & Professional Experience

Master Instructor, University of South Florida	2010-Present
Assistant Professor/Lecturer, Charleston Southern University	2003-2009
Lecturer, University of Delaware	2000-2003
Assistant Professor/Lecturer, St. Francis Xavier University	1997-2000
Quality Engineering Manager, L-3 Communications, Inc.	2009 –2010
Founder and President, True North Information Systems	1990-1997
Quality Systems Engineer, Philips Components Corporation	1994
Programmer Analyst, Aquidneck Management Associates	1988-1994
Office Automation Analyst, Vanguard Technologies	1987-1988
Senior Data Systems Coordinator, Gilbane Building Company	1985-1987

Current Membership in Professional Organizations

- Association for Information Systems (AISWorld)

Honors and Awards

- Outstanding Undergraduate Teaching Award, University of South Florida, 2016

Select Publications from the Past Five Years

- Walczak, Steven and Sullivan, John J. (2017), "In Their Words: Classifying Organizational Reliability from Employee Speech", *International Journal of Business Environment*, 9, 18-33.
- Sullivan, John J. (2014), "Modeling Operational Reliability: The Discovery of the Organizational Learning Loop", *Journal of Business and Economics*, 5, 1536-1550.

Professional and University Service Activities

Professional Service

- International Journal of Project Organization and Management, peer reviewer.

- The Learning Organization Journal, peer reviewer.
- International Conference on Management, Leadership and Governance, Committee member and Track Chair.
- European Conference on Management, Leadership and Governance, Committee member.
- International Conference on Information Systems peer reviewer.
- Southern Association of Information Systems Conference peer reviewer.
- Editorial Review Board, Advances in Global Information Management Book Series.
- ISOneWorld Conference peer reviewer.
- Americas Conference on Information Systems peer reviewer.
- Administrative Sciences Association of Canada peer reviewer.

University Service

- USF iSchool Faculty Affairs Committee
- USF iSchool Undergraduate Curriculum Committee
- USF iSchool Faculty Search Committee
- USF Computer Committee

Steven Walczak

Education

Ph.D., Computer and Information Science	University of Florida, 1990
M.S., Computer Science	Johns Hopkins University, 1985
B.S., Mathematics	Pennsylvania State University, 1981

Academic & Professional Experience

Associate Professor (tenured), University of South Florida	2015-Present
Associate Professor (tenured), University of South Carolina	2014-2015
Associate Professor (tenured), University of Colorado – Denver	2002-2014
Assistant Professor, University of Colorado – Denver	1998-2002
Associate Professor (untenured), University of South Alabama	1997-1998
Instructor, University of South Florida	1994-1997
Assistant Professor, University of Tampa	1991-1994
Visiting Assistant Professor, University of Florida	Spring 1991
Senior Software Engineer, Computer Science Innovations	1987
Lead Engineer, Harris Corporation	1986-1987
Associate Computer Scientist, National Security Agency	1981-1986

Honors and Awards

- Reviewer of the Year Award, 2009, *Journal of Theoretical and Applied Electronic Commerce Research*.
- Best Paper Award, 2002 Information Resources Management Association International Conference.
- Best Application Paper Award, 1998 Decision Sciences Institute National Annual Meeting
- Educator of the Year 1992-93, presented by Pi Sigma Epsilon, Delta Nu Chapter.
- Pi Sigma Epsilon, Marketing Honor Society, inducted 1992.
- Tau Beta Pi, Engineering Honor Society, inducted 1991.
- Upsilon Pi Epsilon, Computer Science Honor Society, sponsored by ACM, inducted 1988.
- Mensa member, inducted 1992

Select Publications from the Past Five Years

- Public Walczak, S., Permuth, J. B., & Velanovich, V. (2019). Analyzing Intraductal Papillary Mucinous Neoplasms Using Artificial Neural Network Methodologic Triangulation. *International Journal of Healthcare Information Systems and Informatics*, 14(4), accepted.
- Walczak, S. (2019, although the issue and volume number are for 2018, this was not published until December 2019). Artificial Neural Network Research in Online Social Networks. *International Journal of Virtual Communities and Social Networking*, 10(4), accepted.

- Walczak, S., & Switzer, A. E. (2019). Raising Social Awareness Through Philately and Its Effect on Philanthropy. *Philanthropy & Education*, 3(1), accepted.
- Walczak, S., & Taylor, N. G. (2018). Geography learning in primary school: Comparing face-to-face versus tablet-based instruction methods. *Computers & Education*, 117, 188-198.
- Walczak, S., & Velanovich, V. (2018). Improving Prognosis and Reducing Decision Regret for Pancreatic Cancer Treatment Using Artificial Neural Networks. *Decision Support Systems*, 106, 110-118.
- Walczak, S. (2018a). The Role of Artificial Intelligence in Clinical Decision Support Systems & Classification Framework. *International Journal of Computers in Clinical Practice*, 3(2), 31-47.
- Walczak, S. (2018b). Society of Agents - A Framework for Multi-Agent Collaborative Problem Solving. *International Journal of Intelligent Information Technologies*, 14(4), 1-23.
- Walczak, S., & Estrada, R. D. (2017). Ameliorating Negative Perceptions of Attention Deficit Hyperactivity Disorder (ADHD) Students. *SM Journal of Community Medicine*, 3(1), 1025.
- Walczak, S., & Okuboyejo, S. R. (2017). An Artificial Neural Network Classification of Prescription Nonadherence. *International Journal of Healthcare Information Systems and Informatics*, 12(1), 1-13.
- Walczak, S., & Velanovich, V. (2017). An Evaluation of Artificial Neural Networks in Predicting Pancreatic Cancer Survival. *Journal of Gastrointestinal Surgery*, 21(10), 1606-1612.
- Walczak, S. (2017). A Text Analytic Approach to Classifying Document Types. *Journal of Writing Analytics*, 1, 103-146.
- Walczak, S., & Sullivan, J. J. (2017). In their words: classifying organizational reliability from employee speech. *International Journal of Business Environment*, 9(1), 18-33.
- Sila, I., & Walczak, S. (2017). Universal versus contextual effects on TQM: a triangulation study using neural networks. *Production Planning & Control*, 28(5), 367-386.
- Walczak, S. (2016). Artificial Neural Networks and other AI Applications for Business Management Decision Support. *International Journal of Sociotechnology and Knowledge Development*, 8(4), 1-21.
- Schooley, B., Walczak, S., Hikmet, N., & Patel, N. (2016), Impacts of Mobile Tablet Computing on Provider Productivity, Communications, and the Process of Care. *International Journal of Medical Informatics*, 88, 62-70. [AIS SIG Health 2017 Best Paper Meritorious Mention Award]
- Walczak, S., & Borkan, G. L. (2016). Personality Type Effects on Perceptions of Online Credit Card Payment Services. *Journal of Theoretical and Applied Electronic Commerce Research*, 11(1), 67-83.
- Walczak, S., & Kellogg, D. L. (2015). A Heuristic Text Analytic Approach for Classifying Research Articles. *Intelligent Information Management*, 7(1), 7-21.

Professional and University Service Activities

Professional Service

- *International Journal of Business Environment*, 2013 – Present, AE (2018 – Present), Editorial Board member (2013-2017).

- *International Journal of Cloud Applications and Computing*, 2017 – Present, International Advisory Board.
- *International Journal of Healthcare Information Systems and Informatics*, 2017 – Present, Associate Editor.
- *International Journal of Intelligent Information Technologies*, 2004 – Present, Editorial Review Board.
- *Journal of Organizational and End-User Computing (JOEUC)*, 2003 – Present, Editor-in-Chief (January 2016-present), Associate Editor (Aug. 2013-December 2015), Editorial Review Board (2003-2013).
- *Journal of Theoretical and Applied Electronic Commerce Research*, 2008 – Present, Editorial Review Board.
- *The Learning Organization* journal, 2005 – Present; Editor-in-Chief (Aug. 2005 – Dec. 2007), Editorial Advisory Board (Jan. 2005 – July 2005, Jan. 2008 – Present).
- *The Open Medical Informatics Journal*, 2008 – 2018, Editorial Advisory Board.

University Service

- Publications Council, USF, Spring 2018-Present, Chair (Spring 2018-Present)
- Sabbatical Committee, USF, 2017-Present, Chair (2018-Present)
- Ethics and Integrity Council, USF, 2017-Present, Chair (2017-18)
- Faculty Council, USF College of Arts and Sciences, 2016-Present
- Healthcare Security Workgroup, Florida Center for Cybersecurity, Spring 2016-2018
- Faculty Affairs Committee, USF School of Information, 2015-2017, Chair (2016-17)
- Graduate Director, University of South Carolina, Spring 2015
- Information Systems Association, University of Colorado – Denver (UCD) Information Systems, 2010-2013, Faculty Advisor (2012-13)
- Research & Creative Activities Committee, UCD, 2002-2007, Chair (2003-07)
- Academic Affairs Committee, UCD Business School, 2005-2008, Chair (2006-08)

Agenda Item: FL 113

USF Board of Trustees
December 3, 2019

Issue: Bachelor of Science in Marine Biology – CIP 26.1302

Proposed action: Approval

Executive Summary:

The Bachelor of Science in Marine Biology is an undergraduate STEM degree designed to augment the students' foundation in basic biology with specialized knowledge and skills in marine biology that address contemporary issues such as coastal resilience, coastal pollution, diseases of marine organisms and restoring damaged habitats. An emphasis on data collection and research methods in the field and laboratory will ready students for employment in places such as consulting firms, environmental agencies, aquaria, and parks, while also preparing them for graduate school.

It will provide graduates with specialized skills that ready them for the workforce in Florida's many agency and private sector positions that focus on coastal and marine environments. It will ready students to take on research careers through analysis of scientific literature, participation in research, and acquisition of specific skills such as computer modelling, remote sensing, and genomics.

Financial Impact:

There will be no financial impact because existing faculty and resources will be reallocated for this new degree program.

Strategic Goal(s) Item Supports:

Well-educated and highly skilled global citizens through our continuing commitment to student success

BOT Committee Review Date: November 20, 2019

Supporting Documentation Online (please circle):

Yes

No

USF System or Institution specific: University of South Florida

Prepared by: Valerie Harwood, Ph.D., Professor and Chair, Department of Integrative Biology

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	Summer 2020
University Submitting Proposal	Proposed Implementation Term
College of Arts and Sciences	Department of Integrative Biology
Name of College(s) or School(s)	Name of Department(s)/ Division(s)
Marine Biology	Marine Biology
Academic Specialty or Field	Complete Name of Degree
26.1302	
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	300	270	\$1,407	\$379,802	0	0	\$379,802
Year 2	325	293					
Year 3	350	315					
Year 4	375	338					
Year 5	400	360	\$1,076	\$387,398	0	0	\$387,398

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 proposed program is an undergraduate B.S. degree in Marine Biology. Students completing the B.S. in Marine Biology at USF will explore the ecology of marine environments and the nature of organisms inhabiting the oceans. The objective of the proposed degree is to augment the students' foundation in basic biology with specialized knowledge and skills in marine biology that address contemporary issues such as coastal resilience, coastal pollution, diseases of marine organisms and restoring damaged habitats. An emphasis on data collection and research methods in the field and laboratory will ready students for employment in places such as consulting firms, environmental agencies, aquaria, and parks, while also preparing them for graduate school. Internships, undergraduate research experiences, upper-level seminars, and reading from the primary literature will develop critical thinking skills and prepare students to address the many complex issues in marine biology, thereby practicing critical thinking and the application of science to grand societal/economic challenges. This B.S. degree in Marine Biology would replace the current Marine Biology major (Tampa) or concentration (St Pete) within the General Biology degree (CIP Code 26.0101). The total number of credit hours for the B.S. in Marine Biology will be 120. There will be no concentrations, tracks, or specializations associated with this program.

Marine Biology is considered an area of strategic emphasis, (STEM), in the Florida SUS system. It will provide graduates with specialized skills that ready them for the workforce in Florida's many agency and private sector positions that focus on coastal and marine environments. It will ready students to take on research careers through analysis of scientific literature, participation in research, and acquisition of specific skills such as computer modelling, remote sensing, and genomics.

- 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 for this degree was presented to the CAVP Academic Program Coordination review group on April 23, 2019, and no concerns were expressed.

- 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

- 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 Marine Biology program directly meets the following high-level SUS Strategic Planning Goals (indicated by double checks) and also indirectly meets other goals as well (indicated by single checks):

Statue University System Goals	Excellence	Productivity	Strategic Priorities for a Knowledge Economy
Teaching & Learning (Undergraduate)	√√ Strengthen Quality & Reputation of Academic Programs and Universities	√√ Increase Degree Productivity and Program Efficiency	√√ Increase the Number of Degrees Awarded in STEM
Scholarship, Research, and Innovation	√Strengthen Quality & Reputation of Scholarship, Research, and Innovation	√√ Increase Research Activity	√Increase Collaboration and External Support for Research Activity
Community & Business Engagement	√Strengthen Quality & Recognition of Commitment to Business & Community	√Increase Levels of Community & Business Engagement	√ Increase Community and Business Workforce

The B.S. in Marine Biology is expected to contribute directly to all three of the SUS Strategic Planning Goals in the Teaching and Learning (Undergraduate) category, which includes:

Strengthen Quality & Reputation of Academic Programs and Universities: The Marine Biology degree at USF will be able to take advantage of the local natural marine resources and the many USF faculty that excel in the Marine Sciences to deliver an excellent education in marine biology.

Increase Degree Productivity and Program Efficiency: This program will expand access of students to marine biology programs, as only two others exist in the Florida SUS system (Florida International University and University of West Florida).

Increase the Number of Degrees Awarded in STEM: Marine Biology, CIP 26.1302, is recognized as a STEM degree by the SUS.

The B.S. in Marine Biology is also expected to contribute directly and indirectly to Scholarship, Research and Innovation:

The Marine Biology Program will directly increase research activity by providing talented and highly motivated undergraduates to carry out undergraduate research in USF laboratories.

Strengthen Quality & Reputation of Scholarship, Research, and Innovation: the new degree program will indirectly contribute to this metric as outstanding scholars are attracted to USF by the emphasis on marine biology.

Increase Collaboration and External Support for Research Activity: A similar indirect effect will be created by the new program on collaboration and external support by the attraction of top class faculty who see their best fit with a marine biology program.

The B.S. in Marine Biology is also expected to contribute indirectly to all of the SUS Strategic Planning Goals in the Community & Business Engagement category:

Strengthen Quality & Recognition of Commitment to Business & Community: The Marine Biology students will be participating in internships and many will gain employment in Tampa Bay and Florida, thus strengthening connections to business and community.

Increase Levels of Community & Business Engagement: In a similar manner, marine biology students who participate in internships and research collaborations and obtain employment in the region and State will act as ambassadors for USF in the community and business arenas.

Increase Community and Business Workforce: The degree is expected to develop the knowledge, skills, abilities, and aptitudes of USF students to compete and succeed in our global society and marketplace.

- 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 degree program falls under the Programs of Strategic Emphasis in the State University System of Florida, Board of Governors 2012 – 2025 Strategic Plan in the Economic Development – Science, Technology, and Math - STEM category and under the Natural Science and Technology subcategory. Marine biology is a field within the natural sciences, focusing on the biology of ocean ecosystems.

- 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 Marine Biology degree will be offered on USF's Tampa and St. Petersburg campuses.

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.**

National need and demand

Marine Biology is a growing field. The growth in biologists (generally) in the workforce is predicted at 2-7% by the Bureau of Labor Statistics, depending upon their specific area (<https://www.bls.gov/>; accessed May 31, 2019). While the BLS does not provide data specifically for marine biology, it predicts 8% growth in the related field of wildlife biology by 2026 and 11% growth in the related field of environmental and conservation by 2026. Students who graduate with a Marine Biology B.S. can work in many areas, including academic research, government research and regulation (e.g. fisheries and coastal management), the aquarium industry and in education. Graduates may also work in positions requiring general biology skills (e.g. lab technician positions, healthcare positions), since they take the core classes required of all biology degrees. There is a current need in research and service in the management and conservation of oceans, and this degree would also expand USF's ability to develop knowledge and innovative ventures to boost success in the management of the marine environment of Florida and beyond.

Job market data from Burning Glass Technologies (Appendix C) projects above average growth in

nationwide jobs in marine biology in the next 8 years (14.5% marine biology vs 7.4% total labor market), from 781,000 recorded in 2017 to 894,000 in 2027. This analysis also indicates above average salaries for graduates in this field on a national level at \$53,596 (Burning Glass data attached). Environmental and Climate Science is one of the most applicable job categories for this degree, and shows an average salary of \$62,843.

Below is the projected Workforce and Economic need related to Marine Biology major as outlined via ONET (<https://www.onetonline.org/>; accessed May 31, 2019)

- a. Marine Biologists/Biologists (+13% projection in the next 10 years in Florida, +8% projection in the next 10 years in US)
- b. Zoologists (+10% projection in the next 10 years in Florida, +8% projection in the next 10 years in US)
- c. Biology Teachers (+22% projection in the next 10 years in Florida, +15% projection in the next 10 years in US)
- d. Biological Technicians (+18% projection in the next 10 years in Florida, +10% projection in the next 10 years in US)
- e. Veterinarians (the proposed program meets all veterinarian school prerequisites) (+30% projection in the next 10 years in Florida, +19% projection in the next 10 years in US)
- f. Animal Trainers (+20% projection in the next 10 years in Florida, +11% projection in the next 10 years in US)
- g. Animal Caretakers (non-farm animals; +33% projection in the next 10 years in Florida, +24% projection in the next 10 years in US)
- h. Fish and Game Wardens (+10% projection in the next 10 years in Florida, +4% projection in the next 10 years in US)
- i. Bioinformatics Technicians (+13% projection in the next 10 years in Florida, +8% projection in the next 10 years in US)
- j. Conservation Scientists (+11% projection in the next 10 years in Florida, +6% projection in the next 10 years in US)
- k. Natural Science Managers (+19% projection in the next 10 years in Florida, +10% projection in the next 10 years in US)
- l. Environmental Scientists and Specialists (+15% projection in the next 10 years in Florida, +11% projection in the next 10 years in US)
- m. Museum Technicians and Conservators (+21% projection in the next 10 years in Florida, +12% projection in the next 10 years in US)
- n. Environmental Restoration Planners (+15% projection in the next 10 years in Florida, +11% projection in the next 10 years in US)

The above projections highlight growth in all these lines of employment which are realistic possibilities for graduates of this program.

Need and demand in Florida

Job market data from Burning Glass Technologies projects above average growth in marine biology jobs in Florida over the next eight years (23.2% marine biology vs 15.7% total labor market).

It is worth noting that in all projections from ONET above, the projected growth is greater in Florida than in the national average. Marine biologists are needed to research and manage the state's significant coastal and marine resources. The Bureau of Labor Statistics does not keep data specifically on marine biologist positions but notes that Florida has the 3rd highest level of employment of zoologists and wildlife biologists, after California and Washington and the 4th highest level of employment of conservation scientists, after Texas, California and Colorado. (<https://www.bls.gov/oes/current/oes191023.htm#st>; accessed May 31, 2019)

Need and demand in Tampa Bay

Data are limited on the specific rate of hiring for marine biologists in Tampa Bay, but there are many marine organizations in the area – many of which have hired our graduates with marine biology majors in the past and likely will continue to hire our graduates with a marine biology degree. These include:

- The Southeast Regional Office of the National Oceanic and Atmospheric Administration in St. Petersburg
- The St. Petersburg Coastal and Marine Science Center of the US Geological Survey
- The Florida Institute of Oceanography in St. Petersburg
- The USF College of Marine Science in St. Petersburg
- The Florida Aquarium in Tampa
- The Clearwater Marine Aquarium
- The Florida Fish and Wildlife Conservation Commission in St. Petersburg
- The Florida Fish and Wildlife Research Institute in St. Petersburg
- The Florida Department of Environmental Protection, SW District in Temple Terrace
- Honeymoon Island State Park in Dunedin and other protected areas
- The U.S. Environmental Protection Agency in Tampa
- The Environmental Protection Commission of Hillsborough County in Tampa
- The Coastal Management Office of Pinellas County in Clearwater
- Mote Marine Labs in Sarasota
- The City St. Petersburg Environmental Compliance Division
- The City of Tampa Natural Resources Section
- Various Environmental Consulting firms around Tampa Bay, e.g. Intertek-PSI, Kleinfelder and Terracon – Nordaste
- Various non-profit organizations such as the Tampa Bay Estuary Program, Tampa Bay Watch, the Pier Aquarium, etc.

Job market analyses from Burning Glass Technologies indicate a high projected growth for graduates with marine biology degrees in Tampa Bay (Hillsborough and Pinellas Counties) over the next eight years (24.15% marine-related vs 15.7% total labor market). See Appendix C.

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.

USF Tampa currently offers a Marine Biology major which has 228 students enrolled. The St. Petersburg campus hosts a concentration in Marine Biology (within the General Biology program) with about 100 students currently enrolled. Both the major and concentration are offered with the General Biology CIP Code, 26.0101. The number of students already enrolled in these Marine Biology programs at USF speaks to the demand for a Marine Biology degree at USF. Last year, all students enrolled in the current Marine Biology major (n=200) were asked how important it was to have a Marine Biology degree program versus a degree in Biology with a focus on marine biology. Nearly 50 percent of our enrolled students responded, and 87 percent of them responded that it was “very important” that their diploma stipulated that their degree was in “Marine Biology” (see Appendix C). Admissions recruiters stated that over 500 students applied to USF for the Marine Biology major for Fall 2019. Well over half of Integrative Biology’s prospective students who contact USF prior to admission are seeking Marine Biology as an undergraduate option.

Over the past five years, FIU has graduated 52 Marine Biology B.S.s (10.4/year), and UWF has graduated 117 (23.4/year). In that same time period, Tampa’s Department of Integrative Biology has graduated a similar number of students, 83 (16.6/year) in the current Marine Biology major and St. Petersburg’s Department of Biological Sciences has graduated 43 students from its concentration in Marine Biology. The two existing B.S. programs in Marine Biology in the SUS clearly cannot satisfy the demand for this degree. The demand in USF’s existing major and concentration support the need for the new degree

program; the major and concentration will be discontinued once USF is approved to offer the new degree in the Marine Biology CIP code.

- 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.**

Dr. Valerie Harwood contacted Florida International University (FIU), the University of Miami and the University of West Florida (UWF). Following is a recap of the responses:

- Florida International University, Miami, FL, B.S. in Marine Biology. Chair of Integrative Biology Dr. Valerie Harwood contacted Department of Biology Chair Dr. Steve Oberbauer, who acknowledged receipt of the communication. USF's Provost and Executive Vice President, Ralph Wilcox, contacted FIU's Provost, Executive Vice President and Chief Operating Officer, Kenneth G. Furton, requesting support of USF's request for a new degree program in CIP Code 26.1302; please see Appendix C for FIU's letter of support.
- University of Miami, Miami, FL, B.S. in Marine Biology & Ecology. Dr. Valerie Harwood contacted Department of Marine Biology & Ecology Chair Dr. Martin Grosell. Letter of support from the University of Miami is attached in Appendix C.
- University of West Florida, Pensacola, FL, B.S. in Marine Biology. Dr. Valerie Harwood contacted Department of Biology Chair Dr. Peter Cavnar. Letter of support from University of West Florida is attached in Appendix C.

- 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.**

There are currently over 300 students enrolled in the Marine Biology major at USF Tampa and the Marine Biology concentration at USF St. Petersburg, and therefore we projected a starting enrollment of 300 students. Taking into account part-time students, we anticipate the per-student FTE to be about 27 credits per year. We anticipate the enrollment of the degree will continue to grow after its inception to approximately 400 students by year 5, based on the increasing enrollment trend of the Marine Biology major over the past few years.

The proposed Marine Biology (CIP 26.1302) degree program will replace the existing undergraduate major and concentration in Marine Biology (CIP 26.0101). Given that this proposal is primarily to offer the major under the CIP code with which it best aligns, with some minor curricular revisions, we expect approximately the same number of students to enroll in or change to the new program in Year 1 (see Table 1-A). The present major and concentration in Marine Biology are both currently administered by departments within the College of Arts and Sciences, which will administer the new degree in Marine Biology, so we do not expect a shift between colleges or departments.

- 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 serves a diverse population, ranking as the 245th most diverse university, out of 2,475 US universities, according to College Factual (<https://www.collegefactual.com/colleges/university-of-south-florida-main-campus/student-life/diversity/#secOverall> – accessed 5/31/19). The current major in Marine Biology includes a large proportion of female (66%) and Hispanic students (17%), in addition to those of other non-white ethnicities/races (10%).

The department intends to maintain the diversity within the program via several approaches, including: (1) Recruiting students of diverse backgrounds from university-wide recruiting events held several times per year, (2) Including diverse representation in the advertising media for the new program, and (3) advertise the degree via diverse media outlets.

While FIU also administers a B.S. degree in Marine Biology, we do not anticipate any impact on the enrollment at FIU, as USF already administers a major in Marine Biology. It is anticipated that the future enrollment of the B.S. degree in Marine Biology would come largely from students in the Marine Biology major at USF and future students interested in pursuing careers in the field.

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.)**

As described in Appendix A, Table 4, 14 faculty members would be teaching as a part of the new Marine Biology degree program. The salary and benefits funds for those existing members were calculated proportionate to their anticipated teaching commitment to this program and are displayed in Appendix A, Table 2. In Year 1, salary and benefits for faculty were estimated at \$223,556, A&P salary and benefits at \$19,462 and USPS salary and benefits at \$4,406.

Five year estimates were based on a flat 2 percent increase from Year 1 to Year 5. As such, in Year 5 the faculty salary and benefits costs were estimated at \$228,027, A&P salary and benefits at \$19,852 and USPS salary and benefits at \$4,495.

Given the field skills and practical nature of the curriculum courses, there was an anticipated need for well-qualified adjunct instructors and teaching assistants. Table 2 outlines the budget for two adjunct instructors, estimated at \$10,000 for Year 1 and increasing to \$10,200 by Year 5 (flat 2 percent increase). Table 2 also outlines the budget for five graduate teaching assistants at the Ph.D. level and two graduate teaching assistants at the master's level to assist with course delivery, estimated at \$111,860 for Year 1 and increasing to \$114,097 by Year 5 (flat two percent increase). This cost is also a reallocation, as the department currently employs graduate teaching assistants to teach marine biology major related courses.

Other materials and expenses \$10,517 (Year 1), and \$10,727 (Year 5), will cover the cost of reference materials, vehicle operating costs for field courses and other student-related expenses, i.e. copying/exam production costs. The increase of expenses from Year 1 to Year 5 was due to anticipated increase in supply costs over time.

In total, \$379,802 in funds are anticipated to be reallocated from base E&G total in Year 1 of the program as show in Table 3, Appendix A.

- 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 Department does not plan to offer the program through continuing education, seek approval for market tuition rate, or establish a differentiated graduate-level program.

- 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).**

A thriving Marine Biology major and concentration exist at two of the three USF campuses. Hundreds of students are already served by these programs and therefore we anticipate no negative impact when the resource allocation to the current major are reallocated to the new degree program. Having a full degree in Marine Biology may lead to increased opportunity for internships and community engaged research.

- 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 described above, students are currently enrolled in Marine Biology programs at USF, so we do not anticipate any additional demand on elective or general education courses initially. However, there is currently capacity in both electives and general education courses to absorb the limited extent of projected growth.

- 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 current major is supported fully with existing operational funds, and does not require additional funding from outside of the institution.

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.

According to DataUSA, Burning Glass, and other sources, Marine Biology is a growing field in Florida and nationally.

Qualitative benefits: Only two other Marine Biology B.S. programs exist in Florida, a state that is surrounded by a marine environment. This program will benefit USF by attracting top students, as well

as Florida and the community by training scientists to preserve and capitalize on the state's natural resources. The B.S. in Marine Biology supports each of the current State University System (SUS) Strategic Goals directly or indirectly in all categories. The synergy created by attracting top students to USF and establishing a high-profile marine biology program will help USF recruit and retain even more accomplished faculty for research and teaching, thus strengthening the university's profile in the academic, community, and business worlds.

Quantitative benefits: By providing the degree (as opposed to a major or concentration) and increasing student participation from about 300 to 400 over 5 years, more graduates will be available to fill the growing number of available positions. By keeping this expertise within Florida and our communities, the investment in the students' education is "paid back" to the state and its citizens. These students will be entering positions with salaries well above the national average (e.g. \$53,596 national average for marine biology graduates), or attending top graduate schools to obtain advanced degrees.

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 credit hours for the 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 prerequisites for the proposed B.S. in Marine Biology are consistent with those of the SUS Common Prerequisites for CIP 26.1302.

USF Course	SUS Common Prerequisite CIP 26.1302
BSC 2010/2010L Cellular Processes with Lab	BSC X010/X010L
BSC 2011/2011L Biodiversity with Lab	BSC X011/X011L
CHM 2045/2045L General Chemistry I with Lab	CHM X045/X045L
CHM 2046/2046L General Chemistry II with Lab	CHM X046/X046L
[CHM 2210/2210L Organic Chemistry I with	CHM X210/X210L AND CHM X211/X211L

Laboratory AND CHM 2211/2211L Organic Chemistry II with Laboratory] OR One of the following Physics Sequences: [PHY 2053/2053L General Physics I AND PHY 2054/2054L General Physics II] OR [PHY 2048/2048L General Physics I - Calculus Based AND PHY 2049/2049L General Physics II - Calculus Based]	OR PHY X053/X053L and PHY X054/X054L OR PHY X048/X048L AND PHY X049/X049L
Calculus I: MAC 2241 OR MAC 2311 OR MAC 2281	MAC X241 OR MAC X311 OR MAC X281
Statistics or Calculus II: STA 2023 OR MAC 2242 OR MAC 2312 OR MAC 2282	STA X023 OR MAC X242 also missing OR MAC X312 OR MAC X282

- 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 is not requesting Limited Access status for this program.

- D. If the proposed program is an AS-to-B.S. 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-to-B.S. 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 University of South Florida's mission is to deliver competitive undergraduate, graduate, and professional programs, to generate knowledge, foster intellectual development, and ensure student success in a global environment.

The proposed program will provide a competitive B.S. in Marine Biology with an emphasis on coastal resilience. This program will contribute to knowledge generation and foster intellectual development of our students. Marine ecosystems worldwide have declined due to the growing human population and unsustainable practices. There is a pressing need to improve management practices to preserve marine ecosystems and the various benefits humans derive from them. This program will produce graduates who are excellent problem solvers and critical thinkers, who also have in-depth knowledge of marine biota and ecosystems. They will be competitive and successful in the private sector, in agencies, and in graduate school due in part to hands-on field experience and writing-intensive course work.

- 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 Marine Biology B.S. is designed to capitalize on the coastal location of USF and its demonstrated strength in STEM education and research. Strong Marine Biology programs exist at USF (a major and concentration, respectively, in Tampa and St. Petersburg). Collaborating institutions for research opportunities, internships, and teaching include the College of Marine Science, Mote Marine Laboratory, Florida Fish and Wildlife, and Clearwater Aquarium. The Florida Institute of Oceanography (FIO), based in St. Petersburg, facilitates a field course in marine studies which is offered yearly. FIO also offers subsidized ship time on board its vessels (R.V. Hogarth and R.V. Weatherbird II), as well as subsidized use of the Keys Marine Lab in Layton (Long Key)

- 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 anticipation of consolidation of USF at Tampa, St. Petersburg, and Sarasota-Manatee, faculty began discussion of a Marine Biology B.S. degree in Fall 2018.

Planning Process and Events Leading to Implementation

Date	Participants	Planning Activity
Fall 2018	Tampa's Integrative Biology faculty and St. Petersburg's Biological Sciences faculty	Ad-Hoc faculty discussions about the Marine Biology degree program
December 2018	Tampa's Integrative Biology faculty and St. Petersburg's Biological Sciences faculty	Discuss the Marine Biology new degree proposal and pre-proposal
Spring 2019	Tampa's Integrative Biology faculty and St. Petersburg's Biological Sciences faculty and college deans	Develop pre-proposal
April 8, 2019	USF Board of Trustees	Marine Biology listed on the Accountability Plan, which was approved by the BOT
April 23, 2019	Council of Academic Vice Presidents (CAVP) Academic Program Coordination Review Group	Pre-proposal presented and no concerns expressed
May - July 2019	Tampa's Integrative Biology faculty and St. Petersburg's Biological Sciences faculty	Meetings to develop Marine Biology curriculum
June - September 2019	Tampa's Integrative Biology faculty and St. Petersburg's Biological Sciences faculty	Developed new degree proposal in consultation with System Academic Planning and CAS (Tampa and St. Petersburg) Deans' Offices
October 14, 2019	Intercampus Consolidation Committee for Curriculum Change (I4C)	I4C approval
October 17, 2019	Academic Program Advisory Council (APAC)	APAC approval
November 20, 2019	Academic Campus Environment (ACE) Committee	ACE Committee approval
December 3, 2019	USF Board of Trustees (BOT)	BOT approval
December 2019	Board of Governors Staff	New degree proposal forwarded to the BOG staff for their review and addition to the SUS Academic Program Inventory

After addition to BOG Academic Program Inventory	USF faculty, staff and advisors	Advertise and market program to students; add to the undergraduate catalog
Fall 2020	USF faculty, staff and advisors	Program Starts

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.

A program review for the Department of Integrative Biology was scheduled in Fall 2019, but was postponed due to consolidation. The St. Petersburg General Biology program with a concentration in Marine Biology was not recently reviewed. Once approved to offer the Marine Biology degree program, it will be added to the normal program review cycle.

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.

Mission Statement

The faculty in the Department of Integrative Biology are committed to understanding the basic principles of biology and applying this knowledge to: 1) address issues of contemporary concern, 2) explore new applications of research and 3) provide students with a comprehensive training in the biological sciences that prepares them for professional endeavors. Research and teaching in the Department emphasizes a modern interdisciplinary approach to understand the interactions across many levels of biological organization – from cells to organisms to populations to communities to landscapes. Faculty research and teaching span a variety of interests of increasing global importance including: marine and freshwater ecology; restoration ecology; population ecology; evolution; plant-animal interactions; community ecology; plant genetics and systematics; conservation biology; ecotoxicology; biomechanics and functional morphology; environmental microbiology; and microbial physiology.

Goal 1: Discipline Specific Knowledge and Skills

- 1a. Student Learning Outcome Statement
Describe the processes by which organisms evolve and how they apply to marine ecosystems.
- 2a. Student Learning Outcome Statement
Explain major ecological relationships among marine organisms and their environments.
- 3a. Student Learning Outcome Statement
Explain the diversity of marine life including the diversity of their forms and functions.
- 4a. Student Learning Outcome Statement
Explain the value of biodiversity, the major threats to marine biodiversity, and the current thinking in approaches to conservation of biodiversity.

Goal 2: Critical Thinking

1a. Student Learning Outcome Statement

Students will be able to analyze and interpret findings from the scientific literature.

Goal 3: Communication Skills

1a. Student Learning Outcome Statement

Students will be able to communicate the results of scientific analyses investigating problems in marine biology.

The Academic Learning Compact I included as Appendix D, which includes the expected student learning outcomes associated with the proposed program.

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

Students applying to the University of South Florida are expected to meet the University's admissions standards, as listed on USF's Office of Admissions' website (<https://www.usf.edu/admissions/>). (URL added 9/2/2019)

For graduation, students must satisfy the requirements from their catalog year while maintaining GPA and grading requirements, and satisfactory completion of the following requirements:

- General Education Program (36 credit hours), including State Core General Education, State Computation and Communication;
- Minimum of 120 unduplicated credit hours;
- A minimum adjusted grade point average (GPA) of 2.0 on all coursework taken at USF and an overall 2.0 GPA average on all college-level coursework;
- Major and college requirements in a chosen degree program;
- Nine credit hours of coursework taken during the summer term(s) (if entered USF with less than 60 credit hours);
- Registration and successful completion of at least thirty (30) of the last sixty (60) credit hours;
- 42 credit hours of upper-level coursework;
- Civics Literacy;
- Foreign language admissions coursework;
- Specific Grading Requirement: Unless otherwise stated, the minimum acceptable grade in all Marine Biology required courses, including the prerequisite math, statistics, and programming courses, is a C or higher (C- is insufficient).
- Each College of Arts and Sciences student is required to complete an application for graduation and graduation checklist.

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 Supporting Courses for the Major (8-10 Credit Hours)**

The following courses are supporting courses for this major. They are required for the major, but are not counted in the total major hours but are counted toward the total program hours of 120 credit hours. The degree will not be awarded if these courses have not been taken by the end of the student's final semester.

1. [(CHM 2210 Organic Chemistry I (3) and CHM 2210L Organic Chemistry I Laboratory (2)) and

(CHM 2211 Organic Chemistry II (3) and CHM 2211L Organic Chemistry II Laboratory (2))

Or

2. [(PHY 2048 General Physics I - Calculus Based (3) and PHY 2048 General Physics I - Calculus Based Laboratory (1)) and (PHY 2049 General Physics I - Calculus Based (3) and PHY 2049 General Physics I - Calculus Based Laboratory (1))]

Or

3. [(PHY 2053 General Physics I (3) and PHY 2053 General Physics I Laboratory (1)) and (PHY 2054 General Physics I (3) and PHY 2054 General Physics I Laboratory (1))]

Note: The course sequence that will count toward the Support Courses requirement is based on which sequence (Organic Chemistry or Physics) the student took to meet the common prerequisite requirement. If the Organic Chemistry sequence was taken to fulfill the common prerequisite requirement, the Physics sequence will meet the supporting courses requirement. The opposite is true if the Physics requirement was used to meet the common course requirement.

Total major credit hours: 32

MARINE BIOLOGY CREDITS: 14 CORE CREDIT HOURS

- BSC 3312 Marine Biology (3)
- PCB 3043 Principles of Ecology (3)
- PCB 3043L Principles of Ecology Laboratory (1)
- PCB 3063 General Genetics (3)
- PCB 3063L General Genetics Laboratory (1)
- PCB 4674 Organic Evolution (3)

MAJOR ELECTIVE COURSES: STUDENTS ARE REQUIRED TO TAKE SIX MAJOR ELECTIVE COURSES FROM THE LIST BELOW, INCLUDING AT LEAST ONE COURSE IN EACH OF THE FOUR CATEGORIES BELOW: 18-23 CREDIT HOURS

1. MARINE BIOLOGY CAPSTONE

- BSC 4937 Seminar in Marine Biology (3) (proposal pending to increase the credit hours to 3)
- BSC 4313C Advanced Marine Biology (4)
- PCB 4315 Marine Ecology (3)
- PCB 4312 Marine Ecosystems Dynamics (3)* (proposal pending)

2. MARINE BIOLOGY STRUCTURES

- PCB 3712 General Physiology (3) AND PCB 3713L General Physiology Lab (1)
- ZOO 3713C Comparative Vertebrate Anatomy (4) (proposal pending to decrease the credit hours to 4)
- MCB 4404 Microbial Physiology and Genetics (3) AND MCB 4404L Microbial Physiology and Genetics Lab (1)
- ZOO 3205C Advanced Invertebrate Zoology (4)
- ZOO 4307 Vertebrate Zoology (3) AND ZOO 4307L Vertebrate Zoology Lab (1) (proposals pending)
- ZOO 4454 Fish Biology (3) AND ZOO 4454L Fish Biology Lab (1)
- OCB 4303 Marine Mammals (3) (proposal pending)
- OCE 4500 Scanning Electron Microscopy (3) (proposal pending)
- BOT 4404C Phycology (4)

3. MARINE ECOLOGY AND ECOSYSTEMS

- BSC 4052 Conservation Biology (3)
- PCB 4312 Marine Ecosystems Dynamics (3)* (proposal pending)
- OCB 4265 Coral Reef Ecology (3) (proposal pending)
- BSC 4866 Restoration Ecology (3) (proposal pending)
- PCB 4315 Marine Ecology (3)
- BSC 4280 Symbiosis (3) (proposal pending)
- BSC 4318 Deep Sea Biology (3) (proposal pending)
- FAS 4405 Aquaculture (3) (proposal pending)

4. FIELD STUDIES IN MARINE BIOLOGY

- BSC 4313C Advanced Marine Biology* (4)
- OCB 3108 Marine Field Studies (4)
- BSC 3360C Tropical Marine Ecology Field Course (3) (proposal pending)

OTHER ELECTIVES

- BSC 4057 Environmental Issues (3)
- BSC 4404 Genomics (3)
- BSC 4910 Undergraduate Research (1-4)
- BSC 4940 Biology Internship (3)

*Courses that are listed in more than one category can be used to fill requirements for only one category

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

See Appendix E for a sequenced course of study for the proposed B.S. in Marine Biology.

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

BOT 4404C Phycology (4): An introduction to freshwater and marine algae, their classification, distribution and ecology.

BSC 3312 Marine Biology (3): A survey of the marine environment, the types of organisms found inhabiting a variety of marine habitats, and the adaptations of the organisms to those habitats. Emphasis is placed on shallow water Florida environments.

BSC 3360C Tropical Marine Ecology Field Course (3): This course will use a hands-on approach to give students a better understanding of the marine ecology and conservation in Curaçao as well as research & monitoring techniques used by field marine biologists. We will spend a significant amount of time underwater observing and investigating coastal ecosystems. (proposal pending)

BSC 4052 Conservation Biology (3): This course provides an extensive introduction to current models and empirical study in conservation biology, including substantial hands-on experience with programming methods for study of data and models.

BSC 4057 Environmental Issues (3): Study of biological, economic, ethical, legal, political and social issues relating to current environmental problems.

BSC 4280 Symbiosis and the Environment (3): This course will provide an overview of the diversity of mutualistic symbioses and their critical roles in the natural environment. (proposal pending)

BSC 4313C Advanced Marine Biology (4): A detailed analysis of marine environment in the Tampa Bay or surrounding area. Field and laboratory work will provide direct experience with the system.

BSC 4318 Deep Sea Biology (3): This course explores the evolution, ecology, and physiology of deep-sea organisms, as well as the interconnectedness of deep-sea organisms and ecosystems with the surface ocean. (proposal pending)

BSC 4444 Genomics (3): We will be using genomic data available from multiple bioinformatics databases to answer an open-ended question fundamental to organismal evolution. The emphasis is to hone scientific inquiry skills in fledgling researchers.

BSC 4866 Restoration Ecology (3): Restoration ecology is a lecture/discussion-based course that explores the application of ecological principles to rebuilding of ecosystems; examples from Florida are emphasized. (proposal pending)

BSC 4910 Undergraduate Research (1-4): S/U only. Junior standing and 3.0 GPA required. Individual investigation with faculty supervision. Written contract by Department is necessary prior to registration.

BSC 4937 Seminar in Marine Biology (3): Course focuses on developing the student's understanding of contemporary research in the field of Marine. Background information presented and assigned reading will vary according to instructor.

BSC 4940 Biology Internship (3): A course to oversee and guide student's internship experience. Internship will be coordinated with a mentor external to the course. Students will meet to discuss internship experiences and progress, and present results.

FAS 4405 Aquaculture (3): This course provides an overview of aquaculture, including water quality production systems, nutrition, spawning, and the common fish and invertebrate groups cultured in the US and around the world. Students will become familiar with the fundamentals of fish and invertebrate husbandry. Students will gain an appreciation of the role of aquaculture through resource management, human food supply, and the global economy (proposal pending)

MCB 4404 Microbial Physiology and Genetics (3): Physiological, metabolic, and genetic phenomena pertinent to understanding the growth, development, ecology, regulation, and reproduction of microorganisms. Emphasizes the interdependence of physiological and genetic approaches.

MCB 4404L Microbial Physiology and Genetics Lab (1): Laboratory portion of Microbial Physiology and Genetics relating to biochemical characteristics and metabolic capabilities of bacteria.

OCB 3108 Marine Field Studies (4): A field course introducing students to marine biological field methods, biodiversity and key biotic/abiotic features of Florida coastal ecosystems. The course will involve travel around the state exploring the coral reefs, estuaries and the open ocean.

OCB 4303 Marine Mammals (3): Students will understand the evolution and systematics of marine mammals as well as gain functional knowledge of their anatomy and physiology. Students will learn about behavior, ecology, and population biology of the group as well. (proposal pending)

OCE 4500 Scanning Electron Microscopy (3): Students learn about the history of microscopy, become familiar with the various types of microscopes and conduct a research project throughout the semester using the scanning electron microscope and other techniques

OCB 4265 Coral Reef Ecology (3): This course explores the diversity and function of coral reef ecosystems. The overall theme will be on ecological concepts, but we will also explore important aspects of the physiology and behavior of reef organisms and will end with a strong emphasis on conservation and management. (proposal pending)

PCB 3043 Principles of Ecology (3): An introduction to the basic principles and concepts of ecology at the ecosystem, community, and population level of organization.

PCB 3043L Principles of Ecology Lab (1): Laboratory portion of PCB 3043, Principles of Ecology.

PCB 3063 General Genetics (3): Introduction to genetics including the fundamental concepts of Mendelian, molecular and population genetics.

PCB 3063L General Genetics Lab (1): Laboratory investigation techniques in general genetics including Mendelian and non-Mendelian relationships, and gene interactions.

PCB 3712 General Physiology (3): Comparative analysis of animal structure and function: organ systems and activities of body tissue and organs. Functional responses of plants to both internal and environmental signals.

PCB 3713L General Physiology Lab (1): Laboratory portion of General Physiology.

PCB 4312 Marine Ecosystems Dynamics (3): Explores the principles that govern important biological processes throughout the world's oceans. (proposal pending)

PCB 4315 Marine Ecology (3): Develop understanding of contemporary marine research. Topics include: reproductive strategies, deep-sea adaptations, biogeography, biodiversity studies, migrations, primary productivity, microbial loop, ecosystem diversity and marine conservation efforts.

PCB 4674 Organic Evolution (3): An introduction to modern evolutionary theory. Lecture on population genetics, adaptations, speciation theory, phylogeny, human evolution and related areas.

ZOO 3205C Advanced Invertebrate Zoology (4): Phylogeny, taxonomy, development, physiology, macro-, microanatomy and natural history of marine/freshwater dwelling invertebrate phyla (including protists and excluding parasites and insects) covered in integrated manner.

ZOO 3713C Comparative Vertebrate Anatomy (4): Anatomy of selected vertebrate types emphasizing evolutionary trends.

ZOO 4307 Vertebrate Zoology (3): Vertebrate Zoology examines the organismal biology of vertebrate animals, their anatomy, physiology, ecology, evolution, and behavior, how vertebrates interact with their environments, and how the many diverse groups of vertebrates have evolved. (proposal pending)

ZOO 4307L Vertebrate Zoology Laboratory (1): Vertebrate Zoology Laboratory examines the organismal biology of vertebrates in field and lab, their anatomy, physiology, ecology, evolution, and behavior, how they interact with the environment, and how the diverse groups of vertebrates have evolved. (proposal pending)

ZOO 4454 Fish Biology (3): Covers the systematics, anatomy, physiology, reproductive biology, behavior and ecology of fish.

ZOO 4454L Fish Biology Lab (1): This is a lab course in fish biology designed to familiarize undergraduate students with the anatomy, ecology, behavior, and classification of fishes.

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.

No industry-driven competencies are explicitly stated for the B.S. in Marine Biology. Our faculty have

collaborated to develop a relevant curriculum that prepares students for the variety of positions available to graduates, and for entry into top-ranked graduate programs. Curriculum assessment is an on-going activity. Faculty have consulted with professionals in various areas to ensure that our curriculum emphasizes skills needed in the job market and graduate school. Future plans include an advisory board composed on various professionals to ensure that our program has sufficient breadth and depth to produce outstanding graduates.

- 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.**

No specialized accreditation societies are available for marine biology.

- 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 primary delivery system for the proposed program will be traditional (on-campus, in person) delivery

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).**

Fourteen full-time faculty from the Tampa and St. Petersburg campuses, as listed below, will participate in the Marine Biology undergraduate program, which will be offered on both campuses:

- Chantale Bégin Ph.D.
- Christopher Osovitz, Ph.D.
- Ryan Carney, Ph.D.
- Kathleen Scott, Ph.D.
- Stephen Deban, Ph.D.
- Bradford Gemmell, Ph.D.
- John Parkinson, Ph.D.
- Susan Bell, Ph.D.

- Melanie Whitmore, Ph.D.
- Heather Judkins, Ph.D.
- Noel Takeuchi, Ph.D.
- Sean Doody, Ph.D.
- Michelle Green, Ph.D.
- Chis Stallings, Ph.D.

- 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 stated under Section III. Budget, the proposed funding for the B.S. in Marine Biology will be reallocated from the funds supporting the existing major (Tampa) and concentration (St. Petersburg) The existing major and concentration will then be terminated. Included in the reallocation are the salaries of existing faculty members currently teaching in the existing major and concentration proportional to their respective effort, totaling approximately \$223,556 per year in Year 1 and \$228,027 in Year 5. Similarly portions of administrative staff salaries, teaching assistant support and expenses are also reallocated from the current program.

- 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 provided for faculty specified in IX A in Appendix F.

- 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.**

Productivity in teaching in the Department of Integrative Biology: Over the past five years (AY 2014-2015 to 2018-2019) our student credit hour trend has been positive, rising from 16,400 to 20,000 (about 588 SCH/faculty/semester). Undergraduate degrees have likewise increased, from 133 to 157 (18% increase). We also host a thriving graduate program that produces approximately 5 Masters and 5 Ph.D. graduates per year. The graduate students are key to undergraduate success in STEM areas, as they teach labs and act as research mentors for the undergraduate students.

Productivity in research: Our faculty have produced an average 12.4 articles per individual, placing the department above the 75th percentile nationwide and comparable to Biology departments at institutions at Virginia Tech and UC San Diego (data from Academic Analytics). 71% of the faculty have at least one federal grant. From FY 2014 - 2018, funding expenditures have risen from \$891,000 to \$1,984,000. Spending in FY 2019 is on track to increase from the previous year, with spending at \$1.6 million to date.

Qualitative indicators of excellence include many awards to our faculty and students over the past five years, which include USF Outstanding Teaching, Distinguished University Professor, NSF Graduate Research Fellowship, Fulbright Awards, AAA Fellowships,

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.

Part I – Overview of USF Libraries, Mission, and Program/Discipline Strengths

The University of South Florida (USF) is accredited by the Southern Association of Colleges and Schools' Commission on Colleges to award associate, baccalaureate, master, specialist and doctorate degrees. 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 and the Hinks and Elaine Shimberg Health Sciences Library, both located on the Tampa Campus; the Nelson Poynter Memorial Library, USF St. Petersburg campus; and an Information Commons at the USF Sarasota-Manatee campus. Access to print resources at the USF Tampa Library is available 24/5, and access to electronic resources is available remotely 24/7.

The USF Libraries inspire research, creativity, and learning by connecting the USF community to relevant and high-quality information. Our vision is to become the center of a highly engaged university community, driven to produce high-impact research and to nourish creativity. Together, the USF Libraries provide access to more than 2 million volumes and an extensive collection of electronic resources including approximately 64,928 e-journal subscriptions and over 900 aggregator databases containing another 92,855 unique e-journal titles, 693,313 e-books, and 826,000 digital images. In addition, students have access to over 83,000 audio/visual materials including electronic media, music scores, audiobooks, CDs, and DVDs.

The USF Libraries endeavor to develop and maintain a research collection that satisfies the resource needs of the undergraduate and graduate curriculums in College of Arts and Science Department of Integrative Biology and also meets the specialized needs of the students and faculty for a Bachelor of Science program in Marine Biology.

Part II - USF Libraries’ Collections

MONOGRAPHS (Print and Ebooks)

The USF Libraries contain extensive holdings of books in both print and e-book format that support student and faculty instructional and research needs in the new program. To identify the scope of relevant books, titles were derived from searching the library’s catalog by Library of Congress Subject Headings relevant to Marine Biology studies.

MONOGRAPHIC COUNTS		
Library of Congress Subject Headings for Marine Biology		
LC Subject Headings	Print	Electronic
Marine Biology	769	257
Marine Science	630	486
Oceanography	1,718	804
Aquatic Biology	189	987
Aquatic Ecology	244	190
Fishes & Ecology	231	83
Totals	3,781	2,807

Total Number of Monographs

- Print = 3,781
- Electronic = 2,807

Ebooks and Ebook Collections

- Cambridge Core Ebooks
- EBSCO Ebook Collection
- Oxford Scholarship Online and University Press Scholarship Online
- ProQuest Ebook Central
- ScienceDirect
- SpringerNature eBooks including Collection in Biomedicine & Life Sciences
- Taylor & Francis and CRCNetBase eBooks
- Wiley Online Library

MAJOR SERIAL TITLES (JOURNALS)

The USF Libraries subscribe to several scholarly and professional journals that have an editorial scope and content which support curricular activities at the Bachelor of Science level. A majority of the titles are in electronic format thereby enhancing accessibility. Journal titles were derived by searching Scopus SciMago and Web of Science JCR ranked journals for curriculum topics in Marine Biology.

Serial Title Subscriptions and Access

- 169 Journal Titles (electronic format)

MAJOR SERIAL TITLES			
Title	SJR	H Index	Library Access
Annual Review of Marine Science	JCR 15.225		01/01/2009 - present
Journal of Great Lakes Research	JCR 2.175		01/01/2006 - 12/31/2010
Fish and Fisheries	3.242	91	01/01/2000 - present
Progress in Oceanography	2.357	120	01/01/1995 - present
Limnology and Oceanography	1.961	179	01/01/1956 - present
Journal of Geophysical Research Oceans	1.887	295	01/01/2013 - present
Harmful Algae	1.703	75	03/01/2002 - present
Freshwater Biology	1.671	139	01/01/1997 - present
CCAMLR Science	1.666	27	01/01/1994 - present
ICES Journal of Marine Science	1.591	105	01/01/1996 - present
Reviews in Fisheries Science and Aquaculture	1.558	54	01/01/2014 - present
Journal of Experimental Biology	1.482	164	01/01/1923 - present (Full Text Delay: 6 months)
Coral Reefs	1.463	101	01/01/1982 - present
Deep-Sea Research Part I: Oceanographic Research Papers	1.446	110	01/01/1993 - present
Reviews in Aquaculture	1.394	30	01/01/2009 - present
Frontiers in Marine Science	1.367	28	01/01/2014 - present
Reviews in Fish Biology and Fisheries	1.331	87	01/01/1991 - present
Fisheries Oceanography	1.316	72	01/01/1997 - present
Aquatic Toxicology	1.277	125	01/01/1995 - present
Aquatic Conservation: Marine and Freshwater Ecosystems	1.250	69	09/01/1991 - present
Marine Policy	1.242	79	01/01/1995 - present
Canadian Journal of Fisheries and Aquatic Sciences	1.225	140	01/01/2001 - present

MAJOR SERIAL TITLES			
Title	SJR	H Index	Library Access
Marine Pollution Bulletin	1.215	147	01/01/1970 - present
Journal of Marine Systems	1.203	94	06/01/1990 - present
Aquaculture	1.154	152	05/01/1972 - present
Freshwater Science	1.125	104	03/01/2012 - present
Journal of Phycology	1.123	114	01/01/1965 - present
Marine Mammal Science	1.102	70	01/01/1997 - present
Advances in Oceanography and Limnology	1.086	1	01/01/2015 - present
Marine Environmental Research	1.081	83	01/01/1995 - present
Journal of Experimental Marine Biology and Ecology	1.063	112	01/01/1967 - present
Estuaries and Coasts	1.056	94	03/01/1978 - present
Estuarine, Coastal and Shelf Science	1.052	118	01/01/1995 - present
Ecohydrology	1.050	43	01/01/2008 - present
Fish and Shellfish Immunology	1.040	103	01/01/1995 - present
Journal of Plankton Research	1.027	85	01/01/1996 - present
Fisheries Research	1.023	82	01/01/1995 - present
Marine Biology	1.019	108	01/01/1967 - present
Ocean and Coastal Management	0.984	70	01/01/1995 - present
Aquaculture Nutrition	0.961	67	01/01/1997 - present
Continental Shelf Research	0.932	100	08/01/1982 - present
Journal of Paleolimnology	0.908	76	07/01/1988 - present
Marine Biotechnology	0.908	68	01/01/1999 - present
Aquacultural Engineering	0.907	61	01/01/1995 - present
Mediterranean Marine Science	0.901	31	01/01/2000 - present
Aquaculture, Economics and Management	0.878	28	01/01/1997 - present
Hydrobiologia	0.875	125	01/01/1948 - present
Wetlands Ecology and Management	0.867	54	01/01/1989 - present
Journal of Fish Biology	0.862	100	01/01/1969 - present
Journal of Sea Research	0.837	71	02/01/1996 - present
Marine and Freshwater Research	0.828	78	01/01/1950 - present
European Journal of Phycology	0.820	66	01/01/1993 - present
Aquatic Ecology	0.815	53	01/01/1968 - present
International Review of Hydrobiology	0.806	48	01/01/1998 - present
Fisheries Management and Ecology	0.803	48	01/01/1997 - present
Marine Ecology	0.800	51	01/01/1996 - present
Biofouling	0.795	77	01/01/1997 - present
San Francisco Estuary and Watershed Science	0.780	11	01/01/2003 - present
Algae	0.778	15	01/01/1996 - present
NeoBiota	0.776	11	01/01/2011 - present
Marine Genomics	0.774	26	03/01/2008 - present
Ecology of Freshwater Fish	0.769	48	01/01/1997 - present
Marine and Coastal Fisheries	0.760	23	01/01/2009 - present
Journal of Applied Phycology	0.759	93	01/01/1989 - present

MAJOR SERIAL TITLES			
Title	SJR	H Index	Library Access
Aquatic Sciences	0.753	64	01/01/1920 - present
Transactions of the American Fisheries Society	0.751	78	01/01/1996 - present
Maritime Studies	0.750	11	01/01/2012 - present
Aquatic Botany	0.746	85	03/01/1995 - present
Phycologia	0.736	60	01/01/1997 - present
Oceanologia	0.722	37	01/01/1971 - present
Bulletin of Marine Science	0.717	67	01/01/1951 - present
Inland Waters	0.698	18	01/01/2011 - present
Limnologica	0.681	40	01/01/1999 - present
California Cooperative Oceanic Fisheries, Investigations Reports	0.679	37	01/01/1950 - present
Journal of Fish Diseases	0.672	75	01/01/1997 - present
Water (Switzerland)	0.670	33	01/01/2009 - present
Marine Biodiversity	0.669	32	01/01/1998 - present
Aquatic Invasions	0.653	42	01/01/2006 - present
Aquaculture Research	0.646	75	01/01/1997 - present
Aquatic Biology	0.638	39	01/01/2007 - present
Helgoland Marine Research	0.623	46	01/01/1999 - present
Environmental Biology of Fishes	0.617	76	01/01/1976 - present
North American Journal of Fisheries Management	0.614	64	01/01/1996 - present
Journal of the Marine Biological Association of the United Kingdom	0.606	60	02/01/1997 - present
Journal of Limnology	0.602	39	01/01/1999 - present
Fishery Bulletin	0.591	60	01/01/1881 - present
Neotropical Ichthyology	0.589	33	01/01/2003 - present
Scientia Marina	0.580	62	01/01/1989 - present
Journal of Crustacean Biology	0.573	47	01/01/1996 - present
Marine Biology Research	0.564	31	01/01/2005 - present
Fish Physiology and Biochemistry	0.555	69	01/01/1986 - present
Fisheries	0.553	71	01/01/1997 - present
Cryptogamie, Algologie	0.547	28	01/01/2011 - present
Aquaculture International	0.542	48	01/01/1993 - present
Journal of the World Aquaculture Society	0.540	52	01/01/1997 - present
Ecohydrology and Hydrobiology	0.531	24	01/01/2006 - present
Limnology	0.530	30	01/01/2000 - present
Journal of Shellfish Research	0.508	55	01/01/2005 - present
Egyptian Journal of Aquatic Research	0.497	18	01/01/2012 - present
African Journal of Marine Science	0.488	45	01/01/2003 - present
Phycological Research	0.487	38	01/01/1995 - present
Regional Studies in Marine Science	0.483	11	03/01/2015 - present
Journal of Applied Ichthyology	0.480	55	01/01/1997 - present
North American Journal of Aquaculture	0.478	36	01/01/1999 - 12/31/2017
Crustaceana	0.472	33	01/01/1960 - present

MAJOR SERIAL TITLES			
Title	SJR	H Index	Library Access
Knowledge and Management of Aquatic Ecosystems	0.470	21	01/01/2008 - present
Polar Science	0.465	20	08/01/2007 - present
Soil and Water Research	0.460	16	01/01/2008 - present
Diatom Research	0.457	31	01/01/1997 - present
New Zealand Journal of Marine and Freshwater Research	0.457	51	01/01/1967 - present
Journal of Aquatic Animal Health	0.444	48	03/01/1996 - present
Lake and Reservoir Management	0.444	34	01/01/1997 - present
Aquatic Ecosystem Health and Management	0.427	37	01/01/1998 - present
Marine and Freshwater Behaviour and Physiology	0.417	31	01/01/1997 - present
Aquatic Living Resources	0.400	58	01/01/1988 - present
Botanica Marina	0.399	51	01/01/1995 - present
Plankton and Benthos Research	0.384	18	01/01/2006 - present
Fisheries Science	0.379	57	01/01/2005 - present
Fundamental and Applied Limnology	0.377	56	01/01/2007 - present
Ciencias Marinas	0.371	26	01/01/1974 - present
Zoosystematica Rossica	0.370	6	01/01/2004 - present
Acta Ichthyologica et Piscatoria	0.369	19	01/01/1970 - present
Marine Biodiversity Records	0.362	15	01/01/2018 - present
American Malacological Bulletin	0.358	29	01/01/2007 - present
Acta Limnologica Brasiliensia	0.354	12	01/01/1986 - present
Hydroecologie Appliquee	0.351	6	01/01/1989 - present
Aquatic Mammals	0.350	19	01/01/2009 - present
Annales de Limnologie	0.343	28	01/01/1965 - present
Iranian Journal of Fisheries Sciences	0.340	15	01/01/1999 - present
Latin American Journal of Aquatic Research	0.338	23	01/01/2008 - present
Iranian Journal of Ichthyology	0.332	8	01/01/2014 - present
Journal of Freshwater Ecology	0.326	32	01/01/1981 - present
International Aquatic Research	0.318	11	01/01/2012 - present
Journal of Integrated Coastal Zone Management	0.314	5	01/01/2007 - present
Journal of Applied Aquaculture	0.313	24	01/01/1997 - present
Turkish Journal of Fisheries and Aquatic Sciences	0.307	22	01/01/2001 - present
Journal of Aquatic Food Product Technology	0.302	27	01/01/1997 - present
Acta Oceanologica Sinica	0.295	23	01/01/2010 - present
Journal of Ichthyology	0.295	14	01/01/2006 - present
African Journal of Aquatic Science	0.288	23	01/01/2000 - present
Limnetica	0.288	28	01/01/1984 - present
Archives of Polish Fisheries	0.286	15	12/30/2008 - present
Marine Fisheries Review	0.277	29	01/01/1971 - present
Cahiers de Biologie Marine	0.269	29	01/01/1960 - present
Boletim do Instituto de Pesca	0.264	12	01/01/1971 - present
Fisheries and Aquatic Sciences	0.261	11	01/01/2009 - present

MAJOR SERIAL TITLES			
Title	SJR	H Index	Library Access
Russian Journal of Marine Biology	0.253	19	01/01/2000 - present
Aquatic Insects	0.250	18	01/01/1997 - present
Journal of Cetacean Research and Management	0.234	20	01/01/1999 - present
AAFL Bioflux	0.232	12	01/01/2008 - present
Revista Ambiente e Agua	0.229	9	01/01/2006 - present
Hydrobiological Journal	0.227	7	01/01/2010 - present
Nippon Suisan Gakkaishi	0.226	23	01/01/1932 - present
Gayana	0.218	15	01/01/1999 - present
Journal of Fisheries and Aquatic Science	0.203	13	01/01/2006 - present
Pan-American Journal of Aquatic Sciences	0.203	16	01/01/2006 - present
Ribarstvo, Croatian Journal of Fisheries	0.195	9	03/30/2016 - present
Limnology and Oceanography Bulletin	0.190	6	09/01/2001 - present
Ruthenica	0.181	3	01/01/2008 - present
Hidrobiologica	0.175	13	01/01/1991 - present
Thalassas	0.170	10	01/01/2001 - present
Indian Journal of Fisheries	0.169	9	01/01/1954 - present
Revista de Biología Marina y Oceanografía	0.167	21	01/01/2001 - present
Geo-Eco-Marina	0.165	6	01/01/2003 - present
Ocean and Polar Research	0.154	11	01/01/2001 - present
Haiyang Xuebao	0.152	3	01/01/2010 - present
Boletín de Investigaciones Marinas y Costeras	0.151	12	12/01/1992 - present
Egyptian Journal of Aquatic Biology and Fisheries	0.137	1	01/01/1998 - present
Aquatic Biosystems	0.124	16	01/01/2005 - 12/31/2015

DATABASES and DIGITAL LIBRARIES

Scholarly, research and instructional activities associated with Marine Biology endeavors are supported by a number of both specialized marine and general scientific databases that provide access to indexes, journal articles, and monographs.

Key Marine Biology Databases

Aquatic Sciences and Fisheries Abstracts (AFSA)
<p>AFSA Aquaculture Abstracts This specialized database is a bimonthly subset of the main ASFA series, specifically selecting its widely dispersed aquaculture-related information. Focusing on studies related to improving and augmenting aquatic yields, the journal provides comprehensive information on cultivating marine, freshwater, and brackishwater species. All types of source documents are surveyed to provide international perspectives on the science, practice, management, and economics of aquaculture.</p>
<p>ASFA 1: Biological Sciences & Living Resources For scientists involved in the cooperative management of the world's living aquatic resources, ASFA 1 provides extensive coverage of basic and applied research on aquatic organisms. All aspects of marine, freshwater, and brackish water organisms and environments are examined, including information on biology and ecology of aquatic organisms, exploitation of living resources, and related legal, policy, and socioeconomic issues.</p>
<p>ASFA 2: Ocean Technology, Policy & Non-Living Resources</p>

ASFA 2 coverage spans the wide-ranging fields of oceanography: physical, descriptive, dynamical, chemical, geological, and biological aspects are extensively examined, as well as limnology, ocean engineering, and specific resources.
ASFA 3: Aquatic Pollution & Environmental Quality ASFA 3 coverage includes research and policy on the contamination of oceans, seas, lakes, rivers, and estuaries.
ASFA Marine Biotechnology Abstracts Topical coverage includes marine biotechnology, molecular biology, molecular genetics, and management of marine environments.
GeoRef
The GeoRef database is the most comprehensive database in the Geosciences. The database covers the geology of North America from 1693 to the present and the geology of the rest of the world from 1933 to the present. It contains earth sciences references and the index terms that describe them and it indexes many journals in 40 languages as well as new books, maps and reports.
Oceanic Abstracts
Provides citations and abstracts to the international technical literature on marine and brackish-water environments. Focuses on marine biology and physical oceanography, fisheries, aquaculture, non-living resources, meteorology and geology, plus environmental, technological, and legislative topics.

General Scientific Databases

AGU Journals [1996 to current issue]
Provides access to full-text to American Geophysical Union journal articles such as: Geochemistry, Geophysics, Geophysical Research Letters (1996-) Global Biogeochemical Cycles (1996-) Journal of Geophysical Research, Journal of Geophysical Research. Biogeosciences (2005-) Journal of Geophysical Research. Oceans (1996-) Paleoceanography (1996-) Tectonics (1996-) Water Resources Research (1996-)
Scopus
Scopus is the largest abstract and citation database of peer-reviewed literature: scientific journals, books and conference proceedings. Delivering a comprehensive overview of the world's research output in the fields of science, technology, medicine, social sciences, and arts and humanities, Scopus features smart tools to track, analyze and visualize research.
SpringerLink
Provides online access to full text of journals from the Springer Publishing Group. -- USF Libraries access is based on purchase of or subscription to specific titles in SpringerLink. Access is generally back to 1997, with backfile access to selected titles.
Web of Science
The ISI Web of Science provides access to the Science Citation Expanded, Social Sciences Citation Index, and Arts & Humanities Citation Index. It enables users to search current and retrospective multidisciplinary information from approximately 8,500 of the most prestigious, high impact research journals in the world. Additional indexes include: BIOSIS Citation Index [1926 - Present] BIOSIS Previews is the online version of Biological Abstracts and Biological Abstracts/RRM (reports, reviews, and meetings), the largest collection of biological sciences records in the world. BIOSIS Previews indexes over 6000 journals covering biological research, medical research findings, and discoveries of new organisms. There is also indexing of meetings, review articles, books reviews, book chapters, software, and U.S. patents. It covers traditional biology (botany, ecology, and zoology); interdisciplinary areas (biochemistry, biomedicine, and biotechnology) and related areas (instrumentation and methods). Zoological Record [1864 - Present] Comprehensive coverage of worldwide zoological literature, including scientific journals, popular journals, monographs, books, newsletters, conferences, selected dissertations, review annuals, and reports. All major areas of zoology are represented, including: behavior, ecology, evolution, habitat, nutrition, parasitology, reproduction, taxonomy, and zoogeography. Applied topics are covered selectively, only when the study focuses on the natural biology of the animal. Selectively covered areas

include immunology, biochemistry, applied biology, veterinary medicine, and toxicology. Zoological Record provides access to scientific literature from over 100 countries.

Other Digital Libraries and Journal Collections

- Elsevier's ScienceDirect
- Wiley Online Library
- Cambridge Core
- Oxford Academic Journals
- Taylor & Francis Online
- ProQuest Dissertations & Theses

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.

As of August 30, 2019, the collections of the USF Tampa Library and affiliates are sufficient to support the new program proposal for a Bachelor of Science in Marine Biology in the Department of Integrative Biology. The Libraries maintain an exceptionally strong collection of resources and services needed to support USF as a Preeminent Research University. The librarians and Dean of the Libraries work closely with the College of Arts and Sciences to ensure all curricular and research needs are more than adequately supported. No additional resources are required to support the new program 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.

Teaching laboratories are taught in the following existing space:

- BSC 4314 Advanced Marine Biology in ISA 3070 (T)
- ZOO 3205C Advanced Invertebrate Zoology in ISA 3070 (T)
- ZOO 4454 Fish Biology in ISA 3069 (lab class is taught in ISA 3069 and ISA 3065 is the fish museum where our fish collection for the class is currently stored) (T)
- ZOO 3407 Biology of Sharks and Rays in ISA 3069 (lab class is taught in ISA 3069 and ISA 3065 is the fish museum where our fish collection for the class is currently stored) (T)
- BOT4404C, ZOO 3205C, OCB 3108, ZOO 4310 in TG 212 (SP)
- PCB 4315, BSC 3312, OCB 4303, BSC 4937 in STG 110 or similar sized classroom (SP)
- OCG 6551C in KRC 3120 and KRC 2125 (SP)
- ZOO 4454, OCB 3265 in STG 115 (SP)

Research laboratories for Marine Biology faculty are located in the following existing space:

- BSF 122 & 124 - K. Scott (T)
- SCA 107 - R. Carney (T)
- SCA 121 Aquarium Facility
- SCA 126 Slug Symbiosis
- SCA 141 - J. Parkinson
- SCA 301 Microscopy & Dissection
- SCA 305 and 308 - B. Gemmell (T)
- SCA 324 and 325 - S. Bell (T)
- STG 222 - H. Judkins (SP)
- STG 217 - M. Riedinger-Whitmore (SP)
- STG 215 - S. Doody, A. Gainsbury (SP)
- DAV 230 - N. Takeuchi (SP)
- DAV 246 - M. Green (SP)

- MSL 204 - C. Stallings (SP)
- KRC 2125 - A. Greco (SP)
- MSL 210A - A. Arellano (SP)
- Mote Marine Laboratory - K. Main (SP)

(T) = Tampa Campus and (SP) = St. Petersburg Campus

- 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 need for new space is anticipated, since the USF Tampa and St. Petersburg campuses have on-going Marine Biology majors.

- 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.**

PAM Fluorometer, Real Time Kinematic (RTK) GPS, refractometer, light meters; salinity meters, YSI multi-meter, underwater drone, microscopes, optical table, particle image velocimetry system, 3D digital holographic imaging system, paddle flume, high speed camera, field sonde, field sampling equipment, including nets, access to research vessels through Florida Institute of Oceanography, access to boats through College of Marine Science, Percival incubators for algal and anenome culture

- 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 anticipated.

- 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 special resource categories are anticipated.

- 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.**

Graduate assistantships will be allocated from those currently supporting the existing Marine Biology major to teaching laboratories associated with the new Marine Biology degree program. Projected costs are shown in Table 2, Appendix 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.**

An internship program is ongoing at USF in St Petersburg, and is in its first year at USF Tampa. Internship coordinators will use existing contacts and will seek new ones through USF's Career Center and from faculty contacts. Practicum experience is provided through Undergraduate Research, where students enroll under direct mentorship of faculty, graduate students and postdoctoral associates.

A small subset of potential employers and intern providers in/around Tampa Bay includes:

- Busch Gardens
- Lowry Park Zoo
- The Southeast Regional Office of the National Oceanic and Atmospheric Administration in St. Petersburg
- The St. Petersburg Coastal and Marine Science Center of the US Geological Survey
- The Florida Institute of Oceanography in St. Petersburg
- The USF College of Marine Science in St. Petersburg
- The Florida Aquarium in Tampa
- The Clearwater Marine Aquarium
- The Florida Fish and Wildlife Conservation Commission in St. Petersburg
- The Florida Fish and Wildlife Research Institute in St. Petersburg
- The Florida Department of Environmental Protection, SW District in Temple Terrace
- Honeymoon Island State Park in Dunedin and other protected areas
- The U.S. Environmental Protection Agency in Tampa
- The Environmental Protection Commission of Hillsborough County in Tampa
- The Coastal Management Office of Pinellas County in Clearwater
- Mote Marine Labs in Sarasota
- The City St. Petersburg Environmental Compliance Division
- The City of St Petersburg Stormwater Division
- The City of Tampa Natural Resources Section
- Various Environmental Consulting firms around Tampa Bay, e.g. Intertek-PSI, Kleinfelder and Terracon – Nordaste
- Various non-profit organizations such as the Tampa Bay Estuary Program, Tampa Bay Watch, the Pier Aquarium, Wildlands Conservation, etc.

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***	170	153	184	165.6	199	179.1	214	192.6	225	202.5
Florida College System transfers to the upper level***	70	63	75	67.5	81	72.9	87	78.3	95	85.5
Transfers to the upper level from other Florida colleges and universities***	30	27	33	29.7	35	31.5	37	33.3	40	36
Transfers from out of state colleges and universities***	30	27	33	29.7	35	31.5	37	33.3	40	36
Other (Explain)***	0	0	0	0	0	0	0	0	0	0
Totals	300	270	325	292.5	350	315	375	337.5	400	360

* 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 columns 1+...+7	Funding Source					Subtotal columns 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
Columns	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Faculty Salaries and Benefits	223,556	0	0	0	0	0	0	\$223,556	228,027	0	0	0	0	0	\$228,027
A & P Salaries and Benefits	19,462	0	0	0	0	0	0	\$19,462	19,852	0	0	0	0	0	\$19,852
USPS Salaries and Benefits	4,406	0	0	0	0	0	0	\$4,406	4,495	0	0	0	0	0	\$4,495
Other Personal Services	10,000	0	0	0	0	0	0	\$10,000	10,200	0	0	0	0	0	\$10,200
Assistantships & Fellowships	111,860	0	0	0	0	0	0	\$111,860	114,097	0	0	0	0	0	\$114,097
Library	0	0	0	0	0	0	0	\$0	0	0	0	0	0	0	\$0
Expenses	10,517	0	0	0	0	0	0	\$10,517	10,727	0	0	0	0	0	\$10,727
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	\$379,802	\$0	\$0	\$0	\$0	\$0	\$0	\$379,802	\$387,398	\$0	\$0	\$0	\$0	\$0	\$387,398

*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)	1.86	1.92
A & P (FTE)	0.08	0.08
USPS (FTE)	0.06	0.06

Calculated Cost per Student FTE

	Year 1	Year 5
Total E&G Funding	\$379,802	\$387,398
Annual Student FTE	270	360
E&G Cost per FTE	\$1,407	\$1,076

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
121100- USF Integrative Biology Faculty Salaries and Benefits	\$2,215,707	\$113,870	\$2,101,837
121100- USF Integrative Biology Staff, A&P Salaries and Benefits	\$286,625	\$8,142	\$278,483
121100 - USF Integrative Biology Assistantships & Fellowships	\$518,905	\$87,860	\$431,045
121100 - USF Integrative Biology Expenses	\$24,825	\$4,517	\$20,308
511209 - USFSP Biology Faculty Salary and Benefits	\$478,036	\$101,316	\$376,720
511209 - USFSP Biology Staff, A&P Salary and Benefits	\$107,268	\$10,727	\$96,541
511209 - USFSP Biology Assistantships & Fellowships	\$144,000	\$12,000	\$132,000
511209 - USFSP Biology Expenses	\$18,000	\$3,000	\$15,000
25000 - USF CMS Faculty Salary and Benefits	\$133,919	\$8,370	\$125,549
25000 - USF CMS Adjunct OPS Salary and Benefits	\$60,000	\$10,000	\$50,000
25000 - USF CMS Staff, A&P Salary and Benefits	\$251,703	\$5,000	\$246,703
25000 - USF CMS Assistantships & Fellowships	\$240,000	\$12,000	\$228,000
25000 - USF CMS Expenses	\$10,000	\$3,000	\$7,000
Totals	\$4,488,989	\$379,802	\$4,109,187

* 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	Chantale Begin Ph.D. Marine Ecology	Instructor II	MYA	Fall 2020	12	1.00	57%	0.57	12	1.00	57%	0.57
A	Christopher Osovitz, Ph.D. Marine Physiology	Instructor III	MYA	Fall 2020	9	0.75	20%	0.15	9	0.75	20%	0.15
A	Ryan Carney, Ph.D. Morphology	Assistant Professor	Tenure-Earning	Fall 2020	9	0.75	6%	0.05	9	0.75	6%	0.05
A	Kathleen Scott, Ph.D. Marine Microbiology	Associate Professor	Tenure	Fall 2020	9	0.75	4%	0.03	9	0.75	4%	0.03
A	Stephen Deban, Ph. D. Animal Physiology	Associate Professor	Tenure	Fall 2020	9	0.75	4%	0.03	9	0.75	4%	0.03
A	Bradford Gemmell, Ph.D. Marine Biology	Assistant Professor	Tenure-Earning	Fall 2020	9	0.75	17%	0.13	9	0.75	17%	0.13
A	John Parkinson, Ph.D. Marine Ecology	Assistant Professor	Tenure-Earning	Fall 2020	9	0.75	7%	0.05	9	0.75	15%	0.11
A	Susan Bell, Ph.D. Marine Ecology	Professor	Tenure	Fall 2020	9	0.75	8%	0.06	9	0.75	8%	0.06
A	Melanie Whitmore, Ph.D. Biological Sciences	Professor	Tenure	Fall 2020	9	0.75	6%	0.05	9	0.75	6%	0.05
A	Heather Judkins, Ph.D. Biological Sciences	Professor	Tenure	Fall 2020	9	0.75	69%	0.52	9	0.75	69%	0.52
A	Noel Takeuchi, Ph.D. Biological Sciences	Instructor I	MYA	Fall 2020	9	0.75	6%	0.05	9	0.75	6%	0.05
A	Sean Doody, Ph.D. Biological Sciences	Professor	Tenure-Earning	Fall 2020	9	0.75	13%	0.09	9	0.75	13%	0.09
A	Michelle Green, Ph.D. Biological Sciences	Instructor I	MYA	Fall 2020	9	0.75	6%	0.05	9	0.75	6%	0.05
A	Chris Stallings, Ph.D. CMS - Marine Science	Professor	Tenure	Fall 2020	9	0.75	6%	0.05	9	0.75	6%	0.05
Total Person-Years (PY)								1.86			1.92	
Faculty Code								PY Workload by Budget Classification				
Code				Source of Funding		Year 1					Year 5	
A	Existing faculty on a regular line			Current Education & General Revenue		1.86					1.92	
B	New faculty to be hired on a vacant line			Current Education & General Revenue		0.00					0.00	
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	1.86			Year 5	1.92	

APPENDIX B

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



 Signature of Equal Opportunity Officer
 Digitally signed by Todd A. Chavez
 DN: cn=Todd A. Chavez, o=University of South
 Florida, ou=USF Libraries,
 email=tchavez@usf.edu, c=US
 Date: 2019.11.07 11:51:49 -0500
 Todd A. Chavez

_____ 11/8/19
 Date
 _____ 11/7/19
 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: Burning Glass Data - Nationwide

VALIDATE: EMPLOYMENT POTENTIAL

PROJECT CRITERIA

Validate	Programs
Location	Nationwide
Degree Level	Bachelor's degree
Time Period	4/1/2018 - 3/31/2019
Selected Programs	Marine Biology and Biological Oceanography (26.1302)
Career Outcomes mapped to Selected Programs of Study	Researcher / Research Associate, Laboratory Technologist, Laboratory Technician, Biologist, Microbiologist, Medical Scientist, Environmental Planner / Scientist, Biological Technician, Laboratory Manager

HOW MANY JOBS ARE THERE FOR YOUR GRADUATES?

For your project criteria, there were **165,014** job postings in the last 12 months.

Compared to:

- 30,868,979 total job postings in your selected location
- 11,114,645 total job postings requesting a Bachelor's degree in your selected location

The number of jobs is expected to **grow** over the next 8 years.

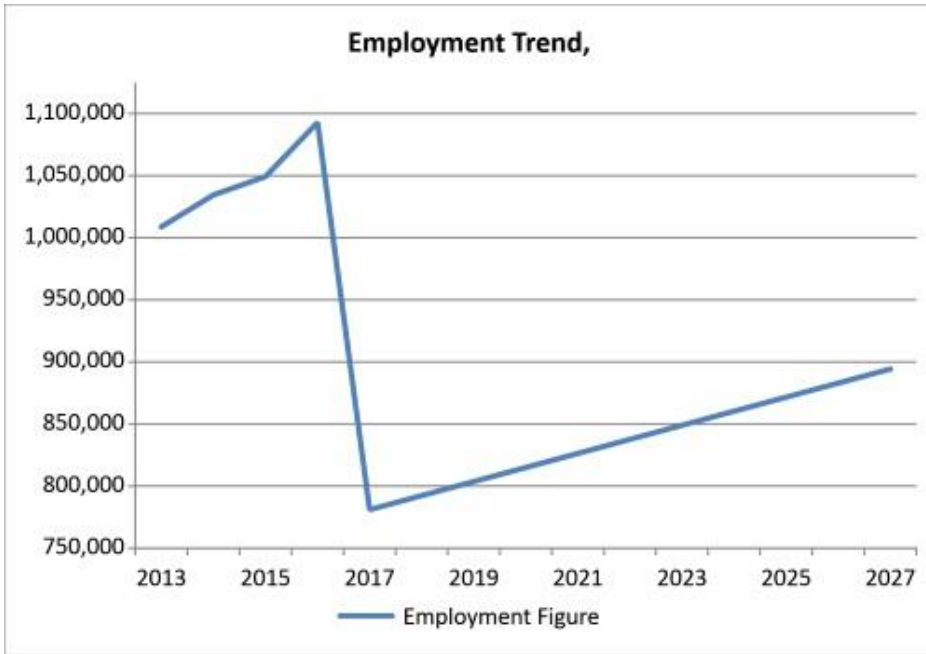
GROWTH BY GEOGRAPHY

Geography	Selected Occupations	Total Labor Market	Relative Growth
Nationwide	14.50%	7.40%	High

HOW HAS EMPLOYMENT CHANGED FOR CAREER OUTCOMES OF YOUR PROGRAM?

	2013	2014	2015	2016	2017	2027
Employment (BLS)	1,008,800	1,034,460	1,049,220	1,092,840	781,080	894,326

Appendix C: Burning Glass Data - Nationwide



Employment data between years 2018 and 2027 are projected figures.

DETAILS BY OCCUPATION

Occupation Group	Postings	LQ	Employment (2017)	Employment Growth (2016 - 2017)	Projected Employment Growth (2018-2027)
Clinical Laboratory Technologists and Technicians	55,843	NA	NA	NA	NA
General Research	48,174	NA	106,050	-2.8%	30.2%
Health and Medical Research	24,968	NA	111,690	2.6%	8.2%
Biological Science	12,141	NA	59,460	4.7%	1.0%
Environmental and Climate Science	8,766	NA	81,920	-2.8%	10.8%
Scientific Technicians	8,354	NA	74,980	0.3%	5.3%
Clinical Research	6,768	NA	346,980	4.5%	16.9%

HOW VERSATILE IS MY PROGRAM?

Graduates of this program usually transition into any of the 7 different occupation groups:

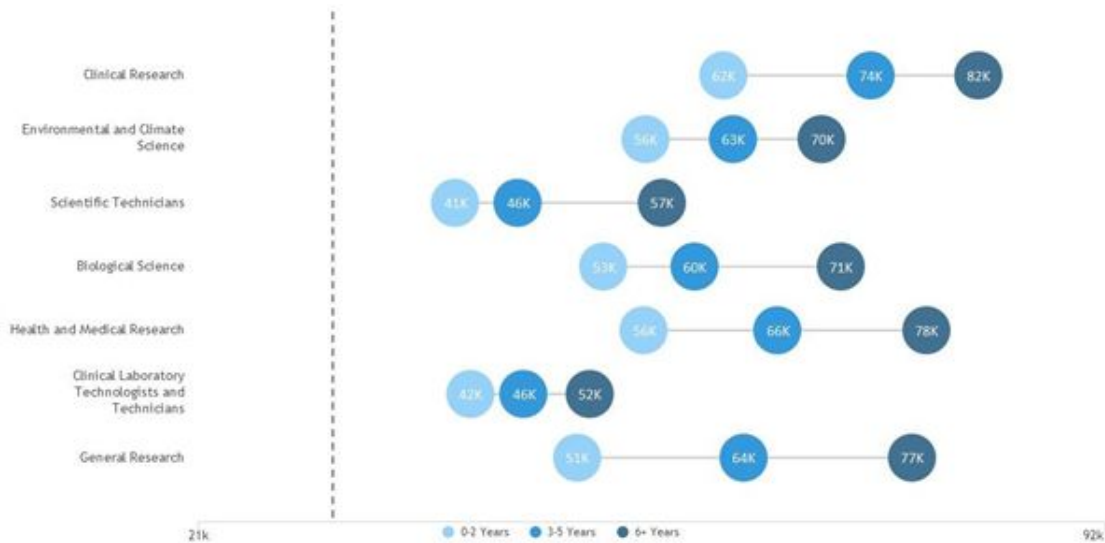
Occupations Group	Market Size (postings)	Percentage of Career Outcome demand
Clinical Laboratory Technologists and Technicians	55,843	33.8%
General Research	48,174	29.2%

Appendix C: Burning Glass Data - Nationwide

Health and Medical Research	24,968	15.1%
Biological Science	12,141	7.4%
Environmental and Climate Science	8,766	5.3%
Scientific Technicians	8,354	5.1%
Clinical Research	6,768	4.1%

WHAT SALARY WILL MY GRADUATES MAKE?

The average salary in the nation for graduates of your program is **\$53,596**. This average salary is **Above** the average living wage for the nation of \$31,450.

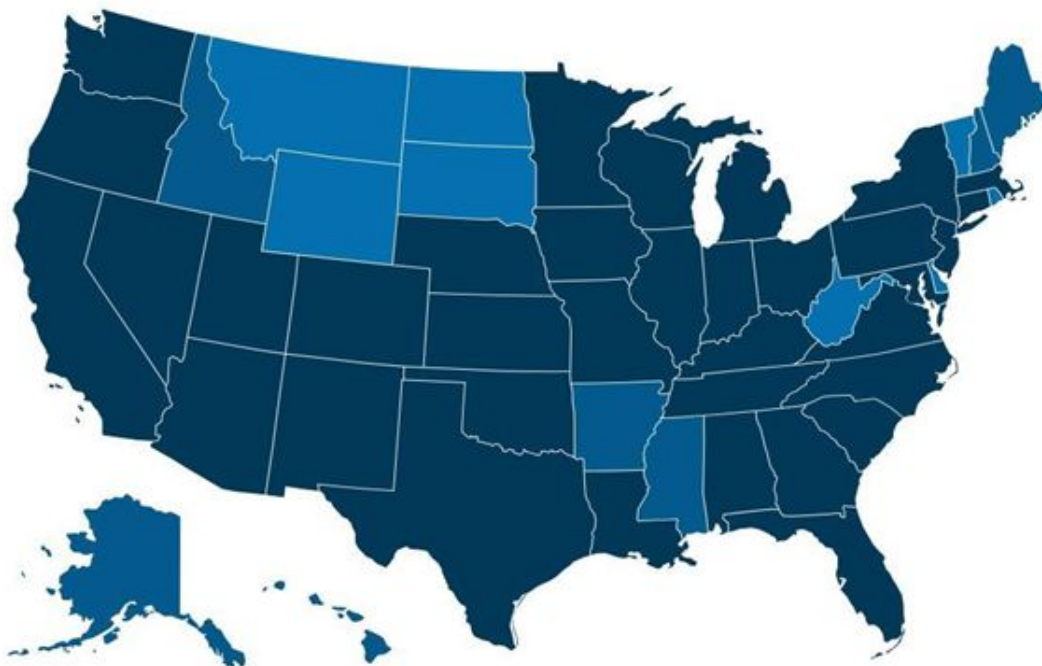


Salary numbers are based on Burning Glass models that consider advertised job posting salary, BLS data, and other proprietary and public sources of information.

Occupation Group	25 th Percentile	Average	75 th Percentile
General Research	\$50,622	\$63,671	\$76,876
Clinical Laboratory Technologists and Technicians	\$42,261	\$46,469	\$51,643
Health and Medical Research	\$55,871	\$66,347	\$78,008
Biological Science	\$52,724	\$59,827	\$71,299
Scientific Technicians	\$41,115	\$46,005	\$57,269
Environmental and Climate Science	\$55,990	\$62,843	\$69,820
Clinical Research	\$62,086	\$73,640	\$82,078

WHERE IS THE DEMAND FOR MY GRADUATES?

Appendix C: Burning Glass Data - Nationwide



TOP LOCATIONS BY POSTING DEMAND

Location	Postings
California	29,363
Massachusetts	11,117
Texas	11,045
New York	9,500
Florida	7,196
Pennsylvania	6,717
North Carolina	6,336
Illinois	5,520
Ohio	5,253
New Jersey	5,218

VALIDATE: COMPETITIVE LANDSCAPE

PROJECT CRITERIA

Validate	Programs
Location	Nationwide

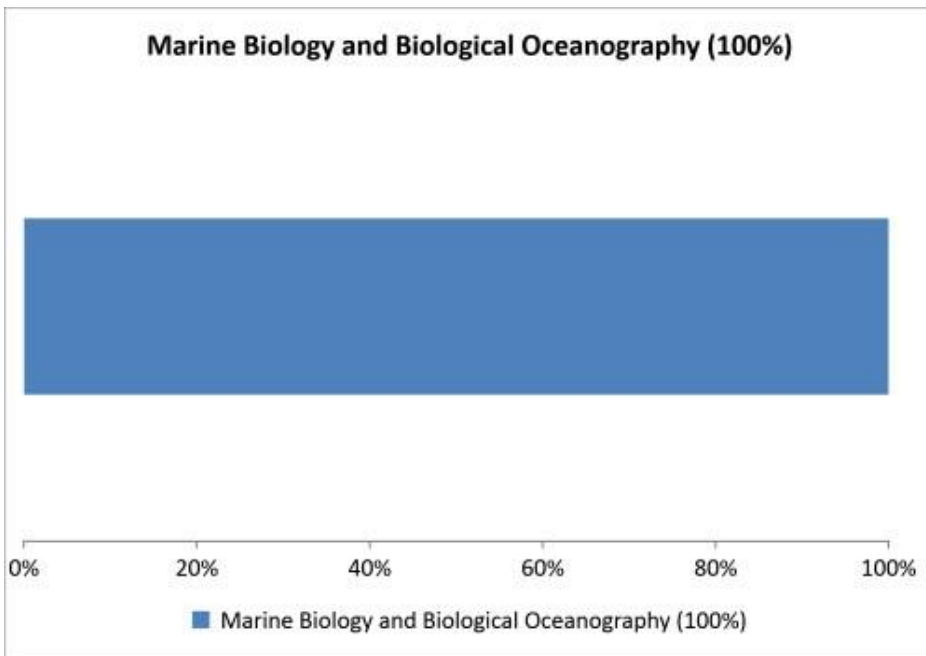
Appendix C: Burning Glass Data - Nationwide

Degree Level	Bachelor's degree
Time Period	4/1/2018 - 3/31/2019
Selected Programs	Marine Biology and Biological Oceanography (26.1302)
Career Outcomes mapped to Selected Programs of Study	Researcher / Research Associate, Laboratory Technologist, Laboratory Technician, Biologist, Microbiologist, Medical Scientist, Environmental Planner / Scientist, Biological Technician, Laboratory Manager

OVERVIEW

	#	% Change (2013-2017)
Degrees Conferred	1,393	14%
Number of Institutions	75	8%
Average Conferrals by Institution	19	5.60%
Median Conferrals by Institution	12	20.00%

MARKET SHARE BY PROGRAM

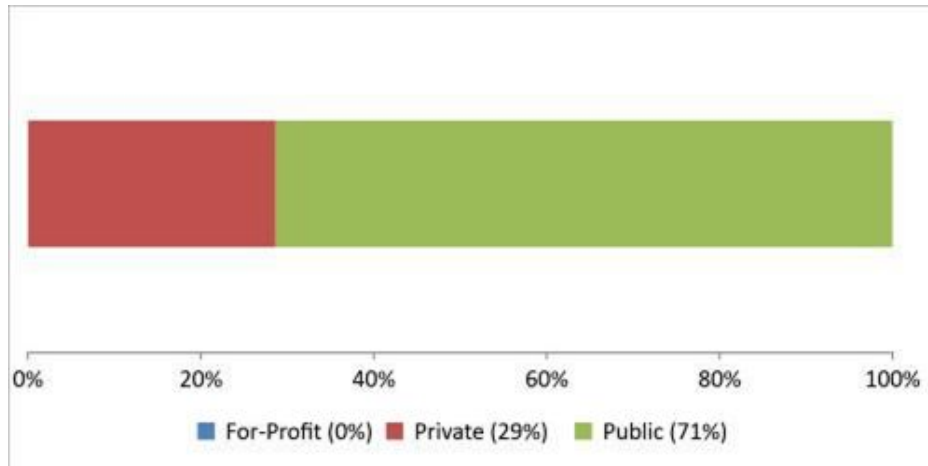


Program	Conferrals (2017)	Market Share (%)
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Appendix C: Burning Glass Data - Nationwide

Marine Biology and Biological Oceanography	1,393	100.00%
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MARKET SHARE BY INSTITUTION TYPE



Institution Type	Conferrals (2017)	Market Share (%)
For-Profit	0	0.00%
Private	399	28.64%
Public	994	71.36%

TOP 10 INSTITUTIONS

Institution	School Type	Market Share (2017)	Market Share Change	Conferrals (2017)	Conferrals Change (2013-2017)
Coastal Carolina University	Public	8.83%	1.70%	123	41.40%
Texas A & M University-College Station	Public	7.47%	0.91%	104	30.00%
University of North Carolina Wilmington	Public	6.03%	-0.77%	84	1.20%
University of California-Santa Cruz	Public	4.02%	-3.52%	56	-39.10%
University of South Carolina-Columbia	Public	3.80%	-1.04%	53	-10.20%
University of Hawaii at Hilo	Public	3.80%	1.10%	53	60.60%

Appendix C: Burning Glass Data - Nationwide

University of Miami	Private	3.45%	-0.32%	48	4.30%
Eckerd College	Private	3.30%	-1.04%	46	-13.20%
Stockton University	Public	3.02%	-0.09%	42	10.50%
University of California-San Diego	Public	3.02%	2.94%	42	4,100.00%

TOP 10 PROGRAMS

Program	Market Share (2017)	Market Share Change	Conferrals (2017)	Conferrals Change (2013-2017)
Marine Biology and Biological Oceanography	100.00%	0.00%	1,393	14.20%

ACTIVE COMPETITORS

Institution	School Type	Market Share (2017)	Market Share Change	Conferrals (2017)	Conferrals Change (2013-2017)
-------------	-------------	---------------------	---------------------	-------------------	-------------------------------

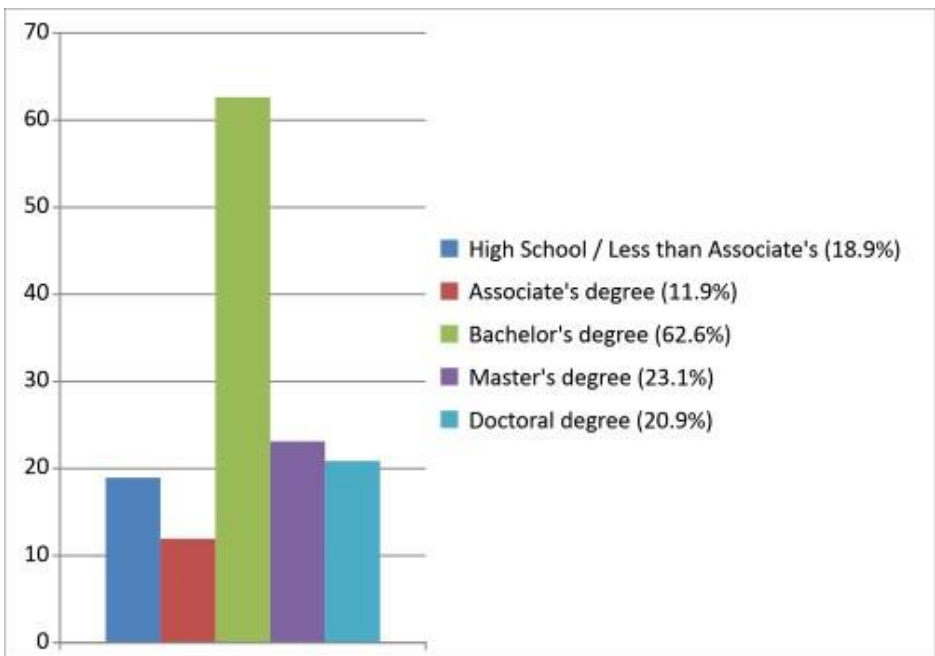
VALIDATE: MARKET ALIGNMENT

PROJECT CRITERIA

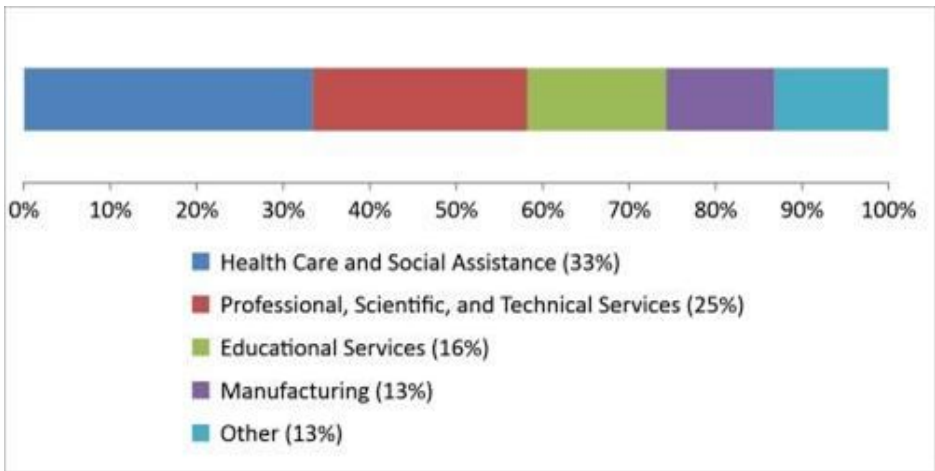
Explore	Programs
Location	Nationwide
Degree Level	Bachelor's degree
Time Period	4/1/2018 - 3/31/2019
Selected Programs	Marine Biology and Biological Oceanography (26.1302)
Career Outcomes mapped to Selected Programs of Study	Researcher / Research Associate, Laboratory Technologist, Laboratory Technician, Biologist, Microbiologist, Medical Scientist, Environmental Planner / Scientist, Biological Technician, Laboratory Manager

JOB POSTINGS BY ADVERTISED EDUCATION (%)

Appendix C: Burning Glass Data - Nationwide

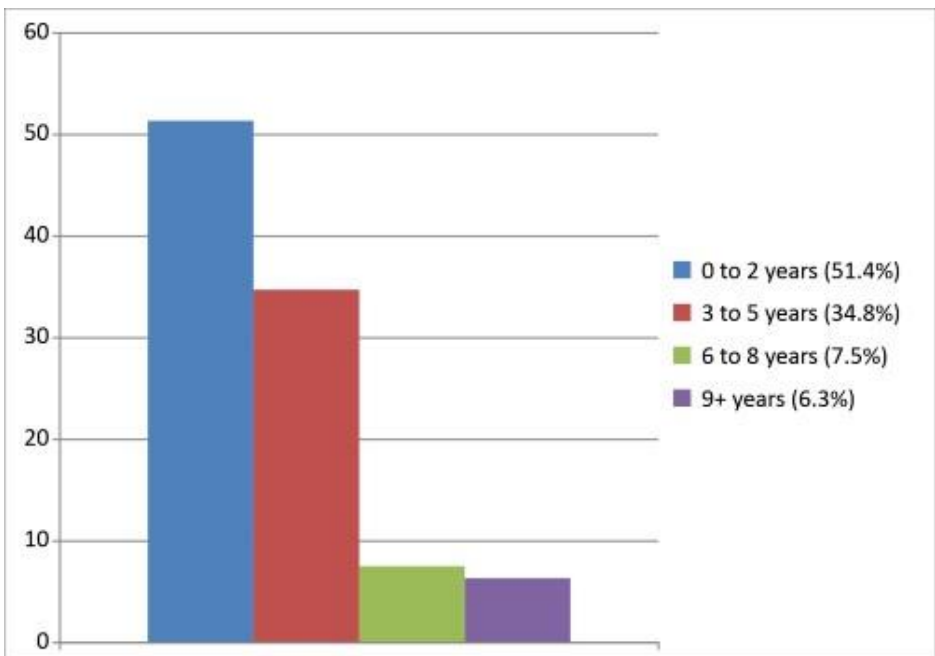


JOB POSTINGS BY INDUSTRY (%)



JOB POSTINGS BY EXPERIENCE REQUESTED (%)

Appendix C: Burning Glass Data - Nationwide



TOP TITLES

Experience Level: All Experience

Title	Postings	Market Share (%)
Laboratory Technician	12,817	10.51%
Medical Technologist	11,461	9.40%
Laboratory Technologist	4,517	3.70%
Research Associate	4,016	3.29%
Research Assistant	3,624	2.97%
Research Technician	2,805	2.30%
Medical Laboratory Technician	2,794	2.29%
Laboratory Assistant	2,527	2.07%
Biologist	2,350	1.93%
Environmental Specialist	2,339	1.92%
Microbiologist	1,837	1.51%
Environmental Scientist	1,821	1.49%
Clinical Laboratory Scientist	1,444	1.18%
Laboratory Manager	1,334	1.09%
Research Analyst	1,222	1.00%

Appendix C: Burning Glass Data - Nationwide

TOP EMPLOYERS HIRING

Experience Level: All Experience

Employer	Postings	Market Share (%)
Department of Veterans Affairs	978	0.80%
Partners Healthcare	864	0.71%
Hospital Corporation of America	844	0.69%
Quest Diagnostics Incorporated	756	0.62%
Pfizer	620	0.51%
Eurofins Scientific	587	0.48%
Celgene Corporation	477	0.39%
Southwestern Medical Center	434	0.36%
Washington University in St. Louis	425	0.35%
Johnson & Johnson	419	0.34%
University Of Texas Md Anderson Cancer Center	373	0.31%
Rollins Incorporated	365	0.30%
University California	365	0.30%
Baptist Health	352	0.29%
US Government	342	0.28%

VALIDATE: KEY COMPETENCIES

PROJECT CRITERIA

Validate	Programs
Location	Nationwide
Degree Level	Bachelor's degree
Time Period	4/1/2018 - 3/31/2019
Selected Programs	Marine Biology and Biological Oceanography (26.1302)
Career Outcomes mapped to Selected Programs of Study	Researcher / Research Associate, Laboratory Technologist, Laboratory Technician, Biologist, Microbiologist, Medical Scientist, Environmental Planner / Scientist, Biological Technician, Laboratory Manager

Appendix C: Burning Glass Data - Nationwide

TOP 15 SPECIALIZED SKILLS				
Skill	Postings	Projected Growth	Salary Premium	Competitive Advantage
Quality Assurance and Control	31095 (19%)	39.46%	No	No
Chemistry	30318 (18%)	-10.21%	No	No
Biology	29338 (18%)	-20.99%	No	No
Experiments	21158 (13%)	3.17%	No	No
Microbiology	19860 (12%)	-13.42%	No	No
Medical Technology	17187 (10%)	-12.63%	No	No
Laboratory Testing	16284 (10%)	16.76%	No	No
Scheduling	14520 (9%)	1.88%	No	No
Molecular Biology	14196 (9%)	-19.19%	No	No
Laboratory Equipment	13294 (8%)	1.48%	No	No
Biochemistry	12556 (8%)	-19.91%	No	No

Appendix C: Burning Glass Data - Nationwide

Data Analysis	11139 (7%)	81.86%	Yes	No
Data Entry	10938 (7%)	0.39%	No	No
Budgeting	10598 (6%)	-10.04%	Yes	No
Data Collection	10393 (6%)	0.22%	No	No

TOP 15 BASELINES SKILLS

Skill	Postings
Research	78880 (48%)
Communication Skills	53047 (32%)
Organizational Skills	29961 (18%)
Detail-Oriented	27795 (17%)
Teamwork / Collaboration	27110 (16%)

Appendix C: Burning Glass Data - Nationwide

Microsoft Excel	24111 (15%)
Writing	23952 (14%)
Problem Solving	21699 (13%)
Troubleshooting	21689 (13%)
Computer Literacy	18032 (11%)
Microsoft Office	17422 (11%)
Planning	15178 (9%)
Written Communication	15078 (9%)
Physical Abilities	13839 (8%)
Multi-Tasking	11646 (7%)

Appendix C: Burning Glass Data - Florida

VALIDATE: EMPLOYMENT POTENTIAL

PROJECT CRITERIA

Validate	Programs
States	Florida
Degree Level	Bachelor's degree
Time Period	4/1/2018 - 3/31/2019
Selected Programs	Marine Biology and Biological Oceanography (26.1302)
Career Outcomes mapped to Selected Programs of Study	Researcher / Research Associate, Laboratory Technologist, Laboratory Technician, Biologist, Microbiologist, Medical Scientist, Environmental Planner / Scientist, Biological Technician, Laboratory Manager

HOW MANY JOBS ARE THERE FOR YOUR GRADUATES?

For your project criteria, there were **7,170** job postings in the last 12 months.

Compared to:

- 1,622,167 total job postings in your selected location
- 542,534 total job postings requesting a Bachelor's degree in your selected location

The number of jobs is expected to **grow** over the next 8 years.

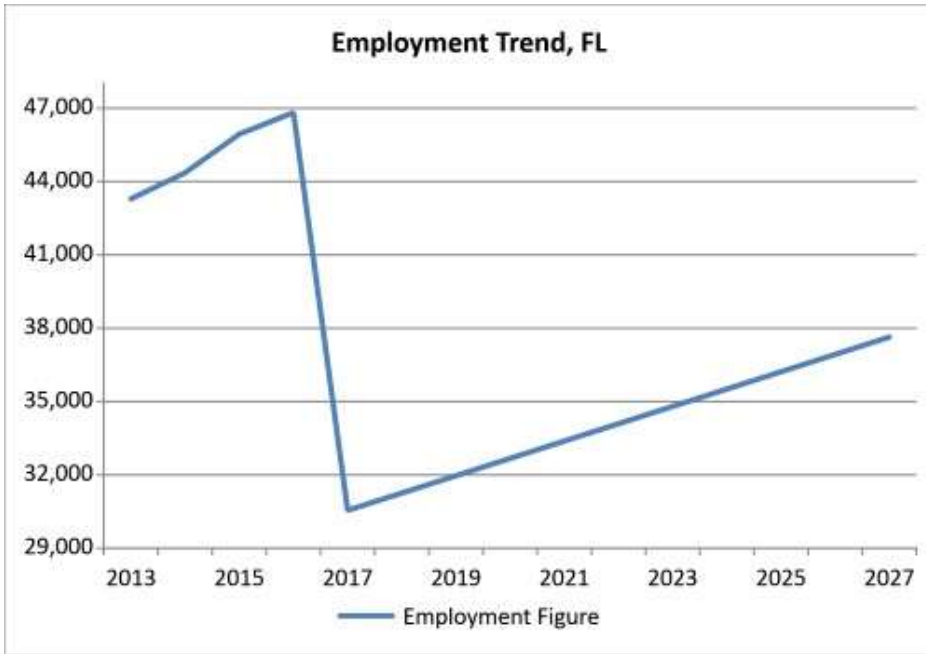
GROWTH BY GEOGRAPHY

Geography	Selected Occupations	Total Labor Market	Relative Growth
Florida	23.20%	15.70%	High
Nationwide	14.50%	7.40%	High

HOW HAS EMPLOYMENT CHANGED FOR CAREER OUTCOMES OF YOUR PROGRAM?

	2013	2014	2015	2016	2017	2027
Employment (BLS)	43,290	44,360	45,940	46,820	30,550	37,638

Appendix C: Burning Glass Data - Florida



Employment data between years 2018 and 2027 are projected figures.

DETAILS BY OCCUPATION

Occupation Group	Postings	LQ	Employment (2017)	Employment Growth (2016 - 2017)	Projected Employment Growth (2018-2027)
Clinical Laboratory Technologists and Technicians	3,222	1.0	NA	NA	NA
General Research	1,731	0.6	4,920	-22.4%	34.8%
Health and Medical Research	636	0.4	2,270	17.0%	22.0%
Biological Science	526	0.8	2,020	11.6%	12.5%
Environmental and Climate Science	473	0.9	5,240	-1.5%	15.5%
Clinical Research	371	1.0	14,440	19.0%	24.8%
Scientific Technicians	211	0.4	1,660	-19.4%	13.9%

HOW VERSATILE IS MY PROGRAM?

Graduates of this program usually transition into any of the 7 different occupation groups:

Occupations Group	Market Size (postings)	Percentage of Career Outcome demand
Clinical Laboratory Technologists and Technicians	3,222	44.9%
General Research	1,731	24.1%

Appendix C: Burning Glass Data - Florida

Health and Medical Research	636	8.9%
Biological Science	526	7.3%
Environmental and Climate Science	473	6.6%
Clinical Research	371	5.2%
Scientific Technicians	211	2.9%

WHAT SALARY WILL MY GRADUATES MAKE?

The average salary in Florida for graduates of your program is **\$49,592**. This average salary is **Above** the average living wage for Florida of \$29,619.



Salary numbers are based on Burning Glass models that consider advertised job posting salary, BLS data, and other proprietary and public sources of information.

Occupation Group	25 th Percentile	Average	75 th Percentile
Clinical Laboratory Technologists and Technicians	\$44,764	\$45,802	\$48,512
General Research	\$45,788	\$57,009	\$77,080
Health and Medical Research	\$55,317	\$60,520	\$63,561
Biological Science	\$43,220	\$52,221	\$61,287
Environmental and Climate Science	\$55,110	\$55,804	\$54,619
Clinical Research	\$58,248	\$71,593	\$77,411
Scientific Technicians	\$37,116	\$42,907	\$0

Appendix C: Burning Glass Data - Florida

VALIDATE: COMPETITIVE LANDSCAPE

PROJECT CRITERIA

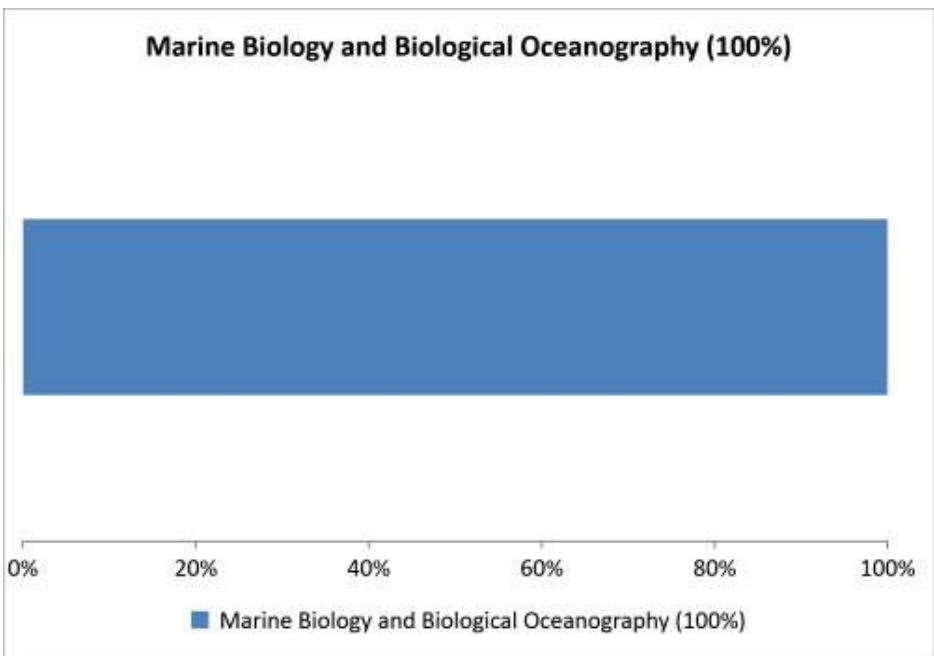
Validate	Programs
States	Florida
Degree Level	Bachelor's degree
Time Period	4/1/2018 - 3/31/2019
Selected Programs	Marine Biology and Biological Oceanography (26.1302)
Career Outcomes mapped to Selected Programs of Study	Researcher / Research Associate, Laboratory Technologist, Laboratory Technician, Biologist, Microbiologist, Medical Scientist, Environmental Planner / Scientist, Biological Technician, Laboratory Manager

OVERVIEW

	#	% Change (2013-2017)
Degrees Conferred	262	13%
Number of Institutions	10	11%
Average Conferrals by Institution	26	0.00%
Median Conferrals by Institution	22	-12.00%

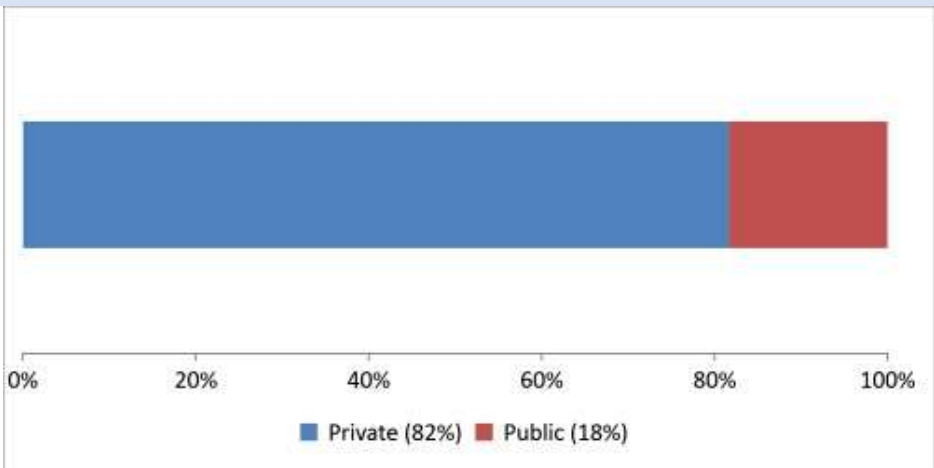
MARKET SHARE BY PROGRAM

Appendix C: Burning Glass Data - Florida



Program	Conferrals (2017)	Market Share (%)
Marine Biology and Biological Oceanography	262	100.00%

MARKET SHARE BY INSTITUTION TYPE



Institution Type	Conferrals (2017)	Market Share (%)
Private	214	81.68%
Public	48	18.32%

Appendix C: Burning Glass Data - Florida

TOP 10 INSTITUTIONS

Institution	School Type	Market Share (2017)	Market Share Change	Conferrals (2017)	Conferrals Change (2013-2017)
University of Miami	Private	18.32%	-1.59%	48	4.30%
Eckerd College	Private	17.56%	-5.38%	46	-13.20%
The University of Tampa	Private	15.65%	2.66%	41	36.70%
The University of West Florida	Public	14.12%	3.30%	37	48.00%
Nova Southeastern University	Private	9.54%	3.05%	25	66.70%
Jacksonville University	Private	6.87%	-0.49%	18	5.90%
Florida Southern College	Private	6.49%	6.49%	17	100.00%
Florida Institute of Technology	Private	5.73%	-6.39%	15	-46.40%
Florida International University	Public	4.20%	-0.56%	11	0.00%
Rollins College	Private	1.53%	-1.07%	4	-33.30%

TOP 10 PROGRAMS

Program	Market Share (2017)	Market Share Change	Conferrals (2017)	Conferrals Change (2013-2017)
Marine Biology and Biological Oceanography	100.00%	0.00%	262	13.40%

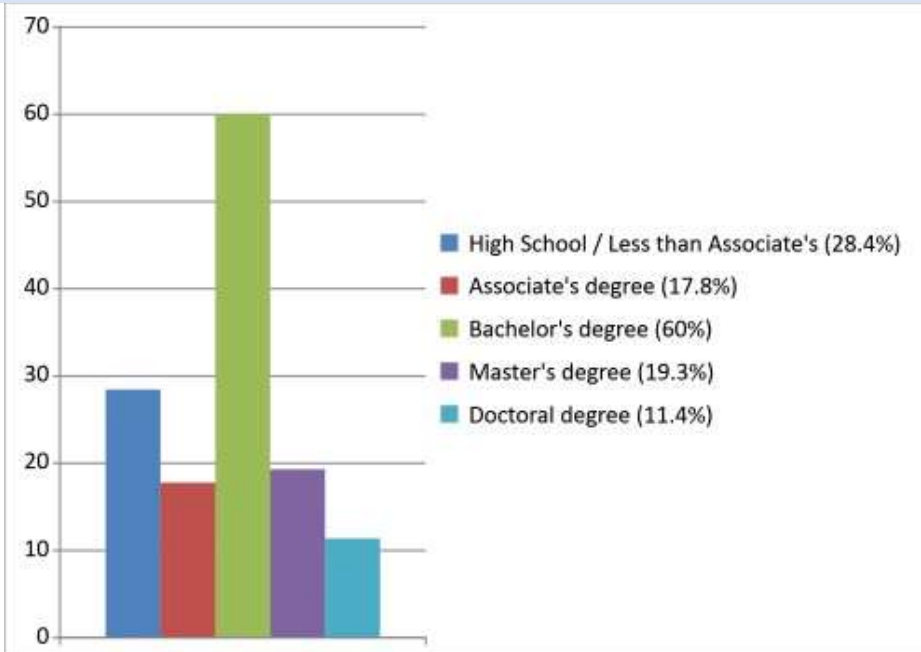
VALIDATE: MARKET ALIGNMENT

PROJECT CRITERIA

Appendix C: Burning Glass Data - Florida

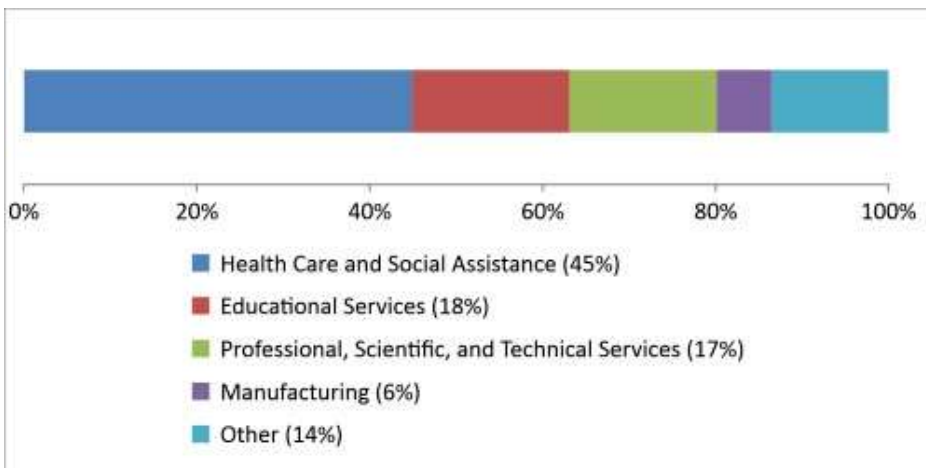
Explore	Programs
States	Florida
Degree Level	Bachelor's degree
Time Period	4/1/2018 - 3/31/2019
Selected Programs	Marine Biology and Biological Oceanography (26.1302)
Career Outcomes mapped to Selected Programs of Study	Researcher / Research Associate, Laboratory Technologist, Laboratory Technician, Biologist, Microbiologist, Medical Scientist, Environmental Planner / Scientist, Biological Technician, Laboratory Manager

JOB POSTINGS BY ADVERTISED EDUCATION (%)

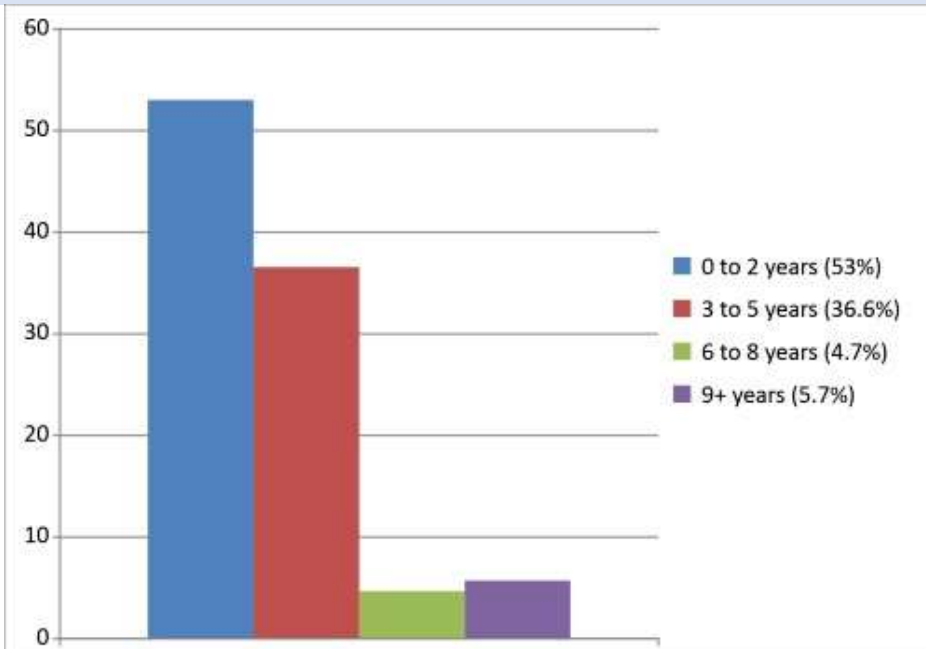


JOB POSTINGS BY INDUSTRY (%)

Appendix C: Burning Glass Data - Florida



JOB POSTINGS BY EXPERIENCE REQUESTED (%)



TOP TITLES

Experience Level: All Experience

Title	Postings	Market Share (%)
Medical Technologist	1,124	22.42%
Laboratory Technologist	449	8.95%
Laboratory Technician	347	6.92%
Environmental Specialist	166	3.31%

Appendix C: Burning Glass Data - Florida

Biological Scientist	103	2.05%
Environmental Scientist	103	2.05%
Research Assistant	92	1.83%
Laboratory Assistant	90	1.79%
Research Associate	83	1.66%
Laboratory Manager	62	1.24%
Operations Biological Scientist	60	1.20%
Biologist	50	1.00%
Wildlife Technician	50	1.00%
Research Analyst	48	0.96%
Medical Laboratory Technician	45	0.90%

TOP EMPLOYERS HIRING

Experience Level: All Experience

Employer	Postings	Market Share (%)
State Florida	235	4.69%
Hospital Corporation of America	228	4.55%
Baptist Health	208	4.15%
University of Miami	199	3.97%
University of Florida	186	3.71%
Florida Hospital	101	2.01%
Moffitt Cancer Center	94	1.87%
Adventist Health	92	1.83%
Orlando Regional Healthcare	89	1.78%
University of South Florida	82	1.64%
University Of Pittsburgh Titusville	73	1.46%
Department of Veterans Affairs	65	1.30%
Mayo Foundation for Medical Education and Research	61	1.22%
Rollins Incorporated	49	0.98%
Central Texas Medical Center	43	0.86%

Appendix C: Burning Glass Data - Regional

VALIDATE: EMPLOYMENT POTENTIAL

PROJECT CRITERIA	
Validate	Programs
Metro Areas (MSAs)	Tampa-St. Petersburg-Clearwater, FL
Degree Level	Bachelor's degree
Time Period	4/1/2018 - 3/31/2019
Selected Programs	Marine Biology and Biological Oceanography (26.1302)
Career Outcomes mapped to Selected Programs of Study	Researcher / Research Associate, Laboratory Technologist, Laboratory Technician, Biologist, Microbiologist, Medical Scientist, Environmental Planner / Scientist, Biological Technician, Laboratory Manager

HOW MANY JOBS ARE THERE FOR YOUR GRADUATES?

For your project criteria, there were **1,525** job postings in the last 12 months. Compared to:

- 358,185 total job postings in your selected location
- 129,382 total job postings requesting a Bachelor's degree in your selected location

The number of jobs is expected to **grow** over the next 8 years.

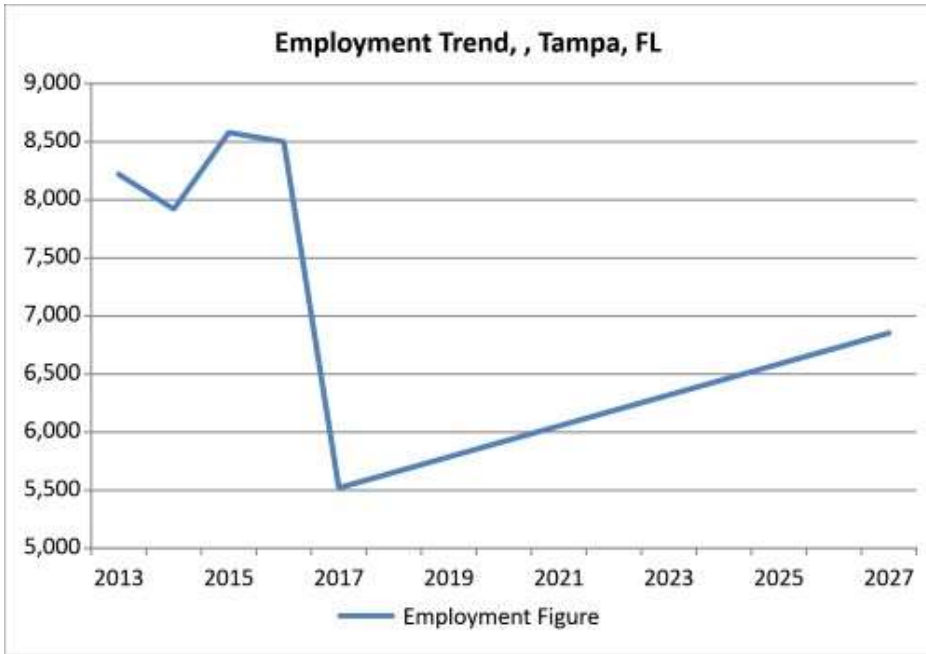
GROWTH BY GEOGRAPHY

Geography	Selected Occupations	Total Labor Market	Relative Growth
Tampa, FL	24.15%	15.70%	High
Florida	23.20%	15.70%	High
Nationwide	14.50%	7.40%	High

HOW HAS EMPLOYMENT CHANGED FOR CAREER OUTCOMES OF YOUR PROGRAM?

	2013	2014	2015	2016	2017	2027
Employment (BLS)	8,220	7,920	8,580	8,500	5,520	6,853

Appendix C: Burning Glass Data - Regional



Employment data between years 2018 and 2027 are projected figures.

DETAILS BY OCCUPATION

Occupation Group	Postings	LQ	Employment (2017)	Employment Growth (2016 - 2017)	Projected Employment Growth (2018-2027)
Clinical Laboratory Technologists and Technicians	704	1.5	NA	NA	NA
General Research	380	0.9	1,080	-17.6%	34.8%
Health and Medical Research	159	0.7	490	96.0%	22.0%
Environmental and Climate Science	89	1.2	860	6.2%	15.5%
Biological Science	87	0.8	180	20.0%	12.8%
Clinical Research	57	1.0	2,640	28.8%	24.8%
Scientific Technicians	49	0.7	270	-3.6%	14.1%

HOW VERSATILE IS MY PROGRAM?

Graduates of this program usually transition into any of the 7 different occupation groups:

Occupations Group	Market Size (postings)	Percentage of Career Outcome demand
Clinical Laboratory Technologists and Technicians	704	46.2%
General Research	380	24.9%

Appendix C: Burning Glass Data - Regional

Health and Medical Research	159	10.4%
Environmental and Climate Science	89	5.8%
Biological Science	87	5.7%
Clinical Research	57	3.7%
Scientific Technicians	49	3.2%

WHAT SALARY WILL MY GRADUATES MAKE?

The average salary in Tampa-St. Petersburg-Clearwater, FL for graduates of your program is **\$49,090**. This average s



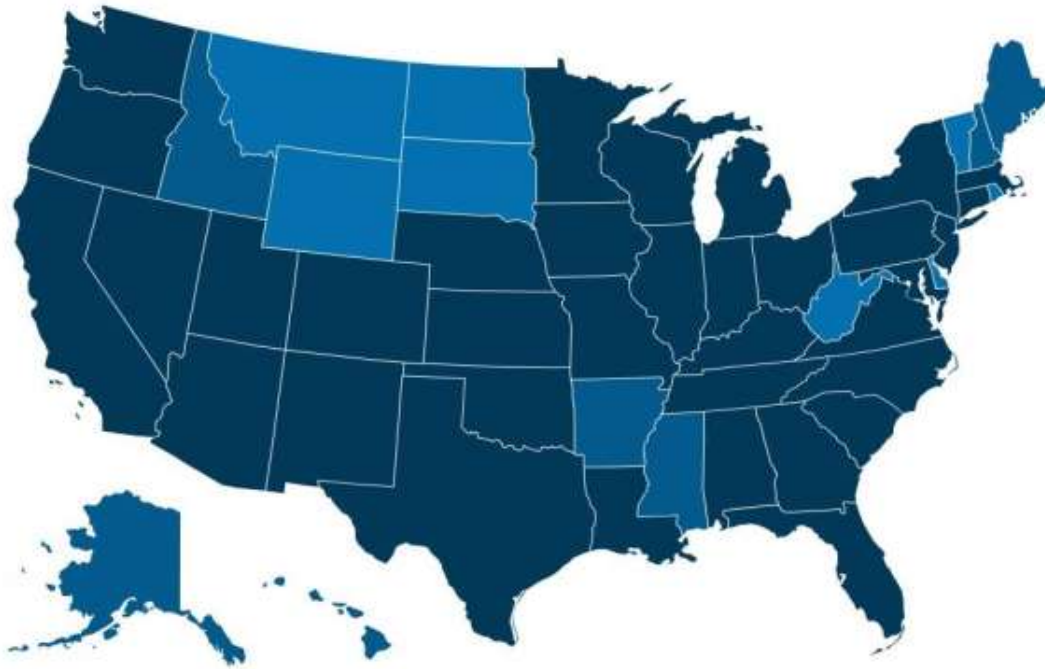
alary is **Above** the average living wage for Tampa-St. Petersburg-Clearwater, FL of \$29,141.

Salary numbers are based on Burning Glass models that consider advertised job posting salary, BLS data, and other proprietary and public sources of information.

Occupation Group	25 th Percentile	Average	75 th Percentile
Clinical Laboratory Technologists and Technicians	\$43,856	\$44,934	\$0
General Research	\$45,845	\$53,182	\$83,081
Health and Medical Research	\$45,735	\$0	\$0
Environmental and Climate Science	\$53,532	\$55,623	\$0
Biological Science	\$42,480	\$56,668	\$0
Clinical Research	\$0	\$75,081	\$0
Scientific Technicians	\$40,945	\$0	\$0

WHERE IS THE DEMAND FOR MY GRADUATES?

Appendix C: Burning Glass Data - Regional



TOP LOCATIONS BY POSTING DEMAND

Location	Postings
California	29,363
Massachusetts	11,117
Texas	11,045
New York	9,500
Florida	7,196
Pennsylvania	6,717
North Carolina	6,336
Illinois	5,520
Ohio	5,253
New Jersey	5,218

Appendix C: Burning Glass Data - Regional

VALIDATE: COMPETITIVE LANDSCAPE

PROJECT CRITERIA

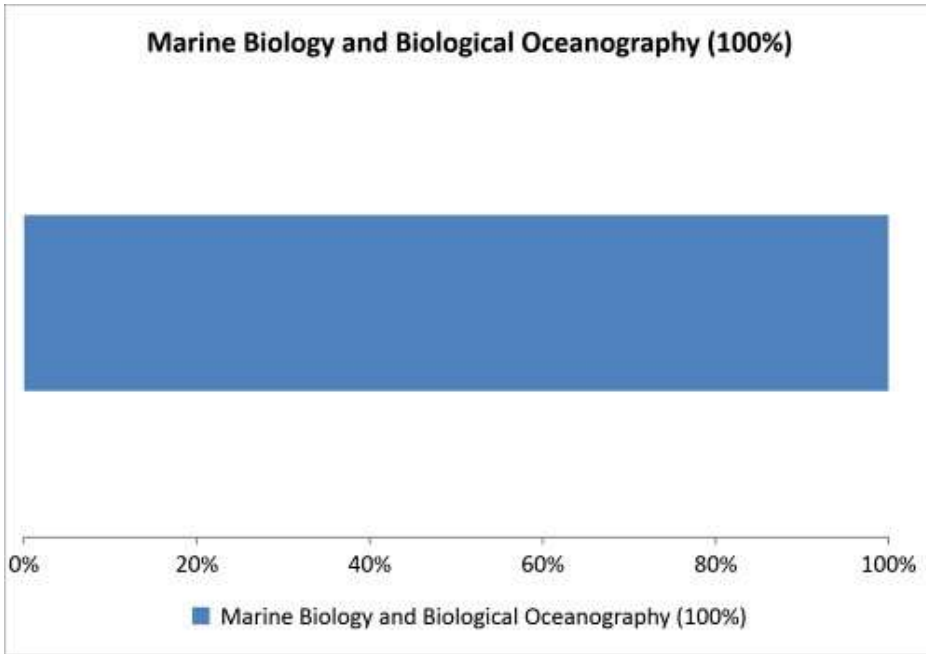
Validate	Programs
Metro Areas (MSAs)	Tampa-St. Petersburg-Clearwater, FL
Degree Level	Bachelor's degree
Time Period	4/1/2018 - 3/31/2019
Selected Programs	Marine Biology and Biological Oceanography (26.1302)
Career Outcomes mapped to Selected Programs of Study	Researcher / Research Associate, Laboratory Technologist, Laboratory Technician, Biologist, Microbiologist, Medical Scientist, Environmental Planner / Scientist, Biological Technician, Laboratory Manager

OVERVIEW

	#	% Change (2013-2017)
Degrees Conferred	87	4%
Number of Institutions	2	0%
Average Conferrals by Institution	44	4.80%
Median Conferrals by Institution	44	4.80%

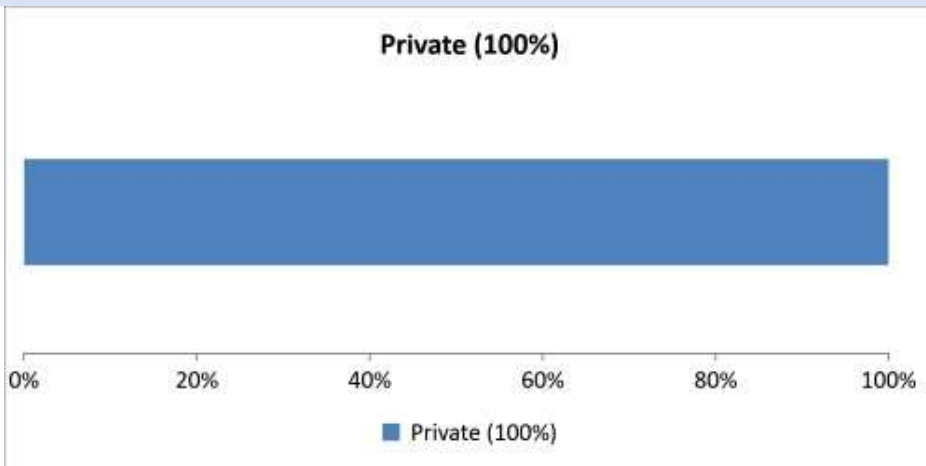
MARKET SHARE BY PROGRAM

Appendix C: Burning Glass Data - Regional



Program	Conferrals (2017)	Market Share (%)
Marine Biology and Biological Oceanography	87	100.00%

MARKET SHARE BY INSTITUTION TYPE



Institution Type	Conferrals (2017)	Market Share (%)
Private	87	100.00%

Appendix C: Burning Glass Data - Regional

TOP 10 INSTITUTIONS

Institution	School Type	Market Share (2017)	Market Share Change	Conferrals (2017)	Conferrals Change (2013-2017)
Eckerd College	Private	52.87%	-10.99%	46	-13.20%
The University of Tampa	Private	47.13%	10.99%	41	36.70%

TOP 10 PROGRAMS

Program	Market Share (2017)	Market Share Change	Conferrals (2017)	Conferrals Change (2013-2017)
Marine Biology and Biological Oceanography	100.00%	0.00%	87	4.80%

ACTIVE COMPETITORS

Institution	School Type	Market Share (2017)	Market Share Change	Conferrals (2017)	Conferrals Change (2013-2017)
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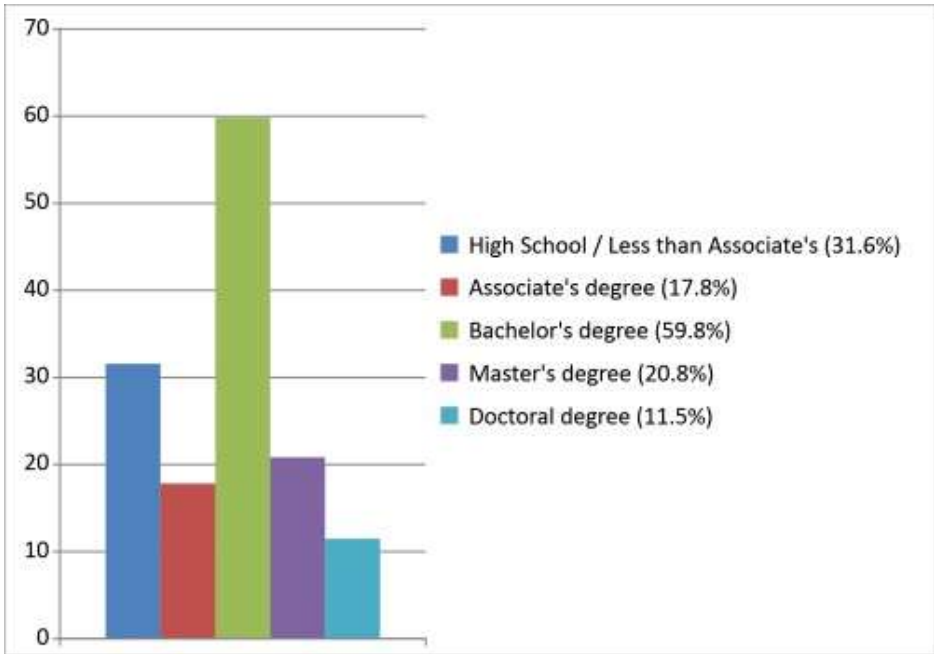
VALIDATE: MARKET ALIGNMENT

PROJECT CRITERIA

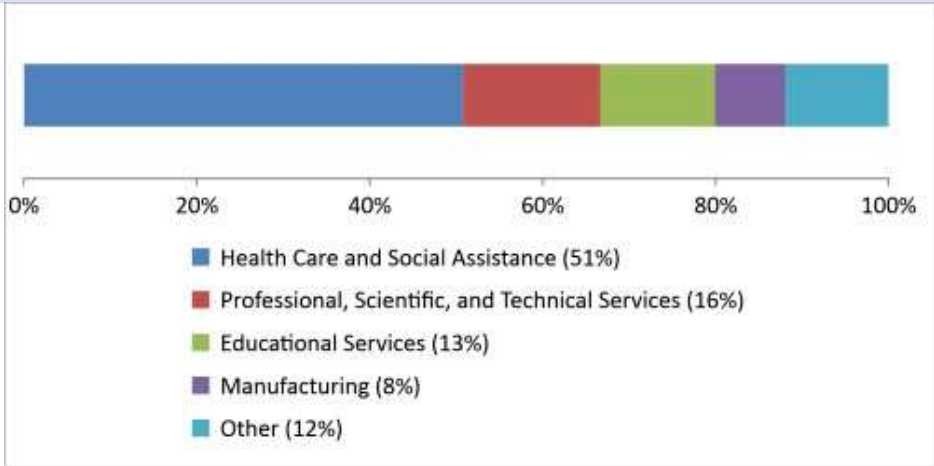
Explore	Programs
Metro Areas (MSAs)	Tampa-St. Petersburg-Clearwater, FL
Degree Level	Bachelor's degree
Time Period	4/1/2018 - 3/31/2019
Selected Programs	Marine Biology and Biological Oceanography (26.1302)
Career Outcomes mapped to Selected Programs of Study	Researcher / Research Associate, Laboratory Technologist, Laboratory Technician, Biologist, Microbiologist, Medical Scientist, Environmental Planner / Scientist, Biological Technician, Laboratory Manager

JOB POSTINGS BY ADVERTISED EDUCATION (%)

Appendix C: Burning Glass Data - Regional

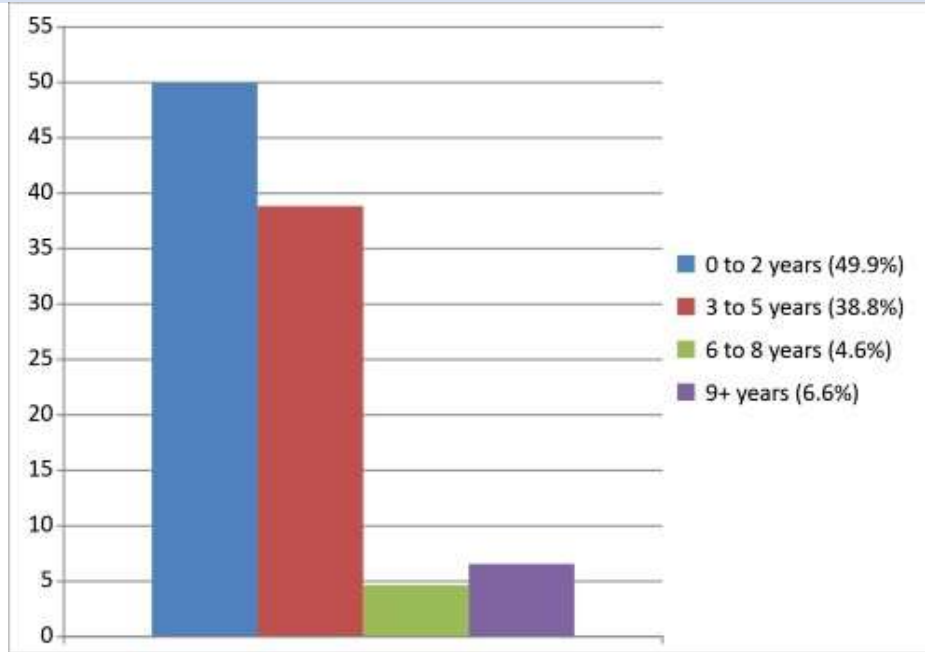


JOB POSTINGS BY INDUSTRY (%)



Appendix C: Burning Glass Data - Regional

JOB POSTINGS BY EXPERIENCE REQUESTED (%)



TOP TITLES

Experience Level: All Experience

Title	Postings	Market Share (%)
Medical Technologist	255	23.74%
Laboratory Technician	91	8.47%
Laboratory Technologist	43	4.00%
Research Assistant	36	3.35%
Environmental Specialist	30	2.79%
Medical Laboratory Technician	26	2.42%
Laboratory Assistant	21	1.96%
Environmental Scientist	19	1.77%
Research Specialist	18	1.68%
Microbiologist	16	1.49%
Research Associate	16	1.49%
Research Analyst	13	1.21%
Biological Scientist	12	1.12%
Scientist	10	0.93%
Biologist	9	0.84%

Appendix C: Burning Glass Data - Regional

TOP EMPLOYERS HIRING

Experience Level: All Experience

Employer	Postings	Market Share (%)
Moffitt Cancer Center	94	8.75%
University of South Florida	82	7.64%
Hospital Corporation of America	71	6.61%
Adventist Health	30	2.79%
Central Texas Medical Center	25	2.33%
State Florida	25	2.33%
Johns Hopkins Medicine	21	1.96%
Quest Diagnostics Incorporated	21	1.96%
Baycare	19	1.77%
IDEXX Laboratories, Inc.	13	1.21%
Unc Chapel Hill	12	1.12%
Catalent Pharma	11	1.02%
Catalent Pharma Solutions	10	0.93%
Intel Corporation	10	0.93%
Lewisgale Regional Health System	10	0.93%

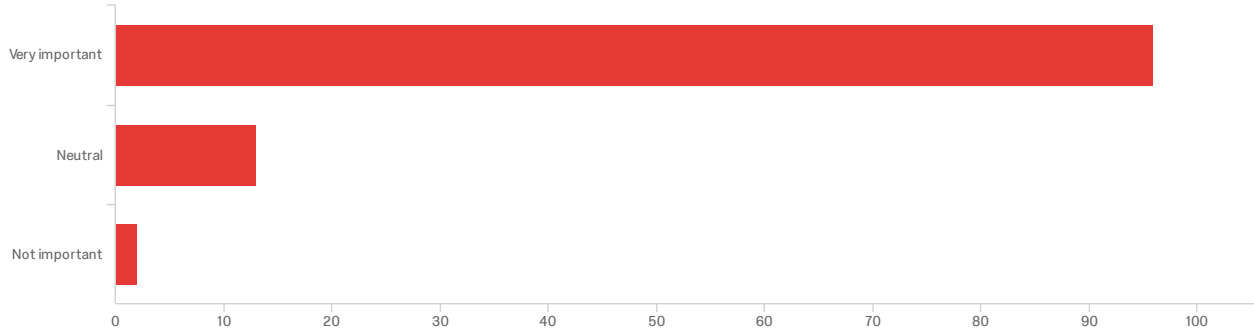
Appendix C: Student Survey

Default Report

"Marine Biology" on your diploma - important or not?

October 24, 2019 7:02 AM MDT

Q1 - How important is it that your diploma says "Marine Biology" after graduation (versus simply "Biology")?

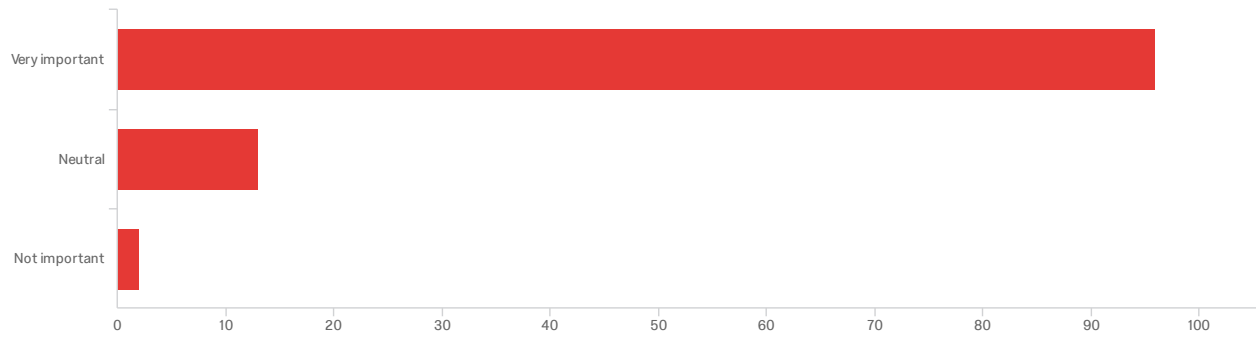


#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	How important is it that your diploma says "Marine Biology" after graduation (versus simply "Biology")?	1.00	3.00	1.15	0.41	0.17	111

#	Field	Choice Count
1	Very important	86.49% 96
3	Not important	1.80% 2
2	Neutral	11.71% 13
		111

Showing rows 1 - 4 of 4

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Q2 - Explain why you think it is or is not important that your diploma states "Marine Biology" as your major (versus simply "Biology") (optional)

Explain why you think it is or is not important that your diploma states "M...

Biology and Marine Biology are two different things. By having it state Marine Biology, it shows what my end goal is versus Biology which is too vague in my opinion.

I specifically think it is important because a majority of the classes for our major do focus on marine ecosystems and species. The area of expertise that our students come out with is marine life- not general biology, not terrestrial, not micro. However, I do think that there is also a positive to having just 'Biology' because it might not make our range of studies seem as narrow to future employers or graduate programs.

Important to distinguish the program from the IB majors

I think it is somewhat important since it is slightly different and a specific biology field chosen

The career that I choose to pursue is either working at an aquarium or doing research out in the ocean. So I prefer to have my degree saying Marine Biology because I want it to be specific.

I want my diploma to say my major. I'm very proud to be graduating with a marine biology degree.

Marine Biology is what I am going to school for. I feel that it is important that my diploma states exactly what I have been learning and what I have been working towards in my field. All I ever wanted was to go to school to study Marine Biology and have that be my diploma and everything I worked for.

The field that I am passionate for & the science I have spent the past 4 years studying is specifically that of the marine environment. The term marine on my diploma signifies that.

Because I worked for this major and i wanna make sure people know

I believe that having a simple biology degree would be fine for would I would like to accomplish. I was actually thinking about changing my major to biology instead.

It is VERY important that my diploma states "Marine Biology" as my major compared to "Biology." When I was choosing an university to attend to, I relied my choice heavily on the major I wanted. Marine Biology is something that I'm very passionate about and my career is to be a marine biology. Therefore, one of the reasons I came to USF was since they had a Marine Biology major, where it would state Marine Biology on my diploma. To emphasize again, Marine Biology is something that I've very passionate about. I would keep my diploma for the rest of my life; therefore, I would want it to represent what I'm very and most passionate about, which is Marine Biology. Stating Marine Biology compared to Biology also shows graduate schools and jobs that I chose a path to focus on a specific part of biology. To connect with this, I went to college to get my degree in Marine Biology because marine biology is what I want to learn. It would make me very upset if my diploma only said "Biology." I want "Marine Biology" on my diploma!

It is because it states what exactly I took all my time studying for. Biology is too vague.

Lol because if I wanted to get a degree in just Biology I would have gotten one in the broad subject of Biology (in which I'm sure is going to be a very common answer). I didn't just spend four years slaving over taking classes like Organic Chemistry, CVA, and both sets of Physics, plus ALL of my marine electives to have a degree that doesn't recognize that literally the only reason I went to college (and I'm pursuing a Masters degree at one of the top researchers institutes in Australia) is to become a MARINE biologist. So yes, it is extremely important to me that my degree says Marine Biology.

I want to work with marine animals and marine habitats, and will be taking mostly marine-g geared courses so I believe that is what my diploma should say.

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Explain why you think it is or is not important that your diploma states "M...

Biology is such a generic term. Regular biology students don't go as in depth with marine life and marine processes as Marine biology students and therefore there should be a difference on our diplomas. I don't want to be thrown into a generic box.

Marine Biology specifies what we have studied throughout our college career. We take several classes that biology majors do not, that should separate our major from theirs

I feel that having a degree that says "Biology" might allow for more opportunities than a if the title was more specialized.

As someone who wants to get a future degree in environmental management, and I am planning to go into management when I graduate. there would be no advantage or disadvantage for my degree to say Marine Biology instead of integrated biology.

If I were a biology major then "Biology" on my degree would be just fine however, if I am working towards a marine biology degree I want that to show on my diploma.

I believe that the large variety of biology tracks warrants specification to some degree, so as to avoid confusion or inaccurate expectations in the work place.

It is very important to me that my diploma states "Marine Biology" because a general "Biology" degree is very generic and does not show any indication of what field of Biology I would want to pursue in the future. The Marine Biology degree offers a vast array of interesting elective courses that specifically target Marine Biology topics, which ultimately leads into new interests within the field. Having a "Biology" degree would be too general and would not allow such specific elective courses. I would personally be very upset if what I wanted to study specifically (Marine Biology) was not recognized on my diploma.

It shows specialization of our knowledge of biology; biology itself is a very broad concept, and the title "marine biology" shows that we have specialized knowledge about biology specifically pertaining to marine systems rather than just general biology knowledge.

I think that Marine Biology is it's own denomination of biology and should be annotated, however, I will not be fully disheartened if it does not specify this on my diploma.

It is important because my major is not as general as Biology is. It is a branch of biology however the degree entails deep and detailed courses concerning the ocean, coastal environments, and how animals interact with these ecologically different environments.

I am dedicated on getting a marine biology degree in order to be an aquarist. So having my diploma stating "Marine Biology" is very important.

Putting Marine Biology shows that I have taken more core classes that regard towards marine species compared to biology as a whole.

If I wanted it to say "biology" I would've picked that major. I've concentrated on the marine field my entire college career and it's important to me to have my diploma back that up.

I think that this distinction is important because biology is a general term whereas "marine" biology is a highly specialized field of knowledge. It is near impossible for one to know every detail of biology, however it is much more feasible to become a master of a branch of biology.

Biology has various subfields, and one of them is Marine Bio. I am studying to become a marine biologist, and not just any other biologist, so I will want my diploma to explicitly say "Marine Biology." It is like when you study for civil engineering, but your diploma just says "engineering" - it just isn't accurate.

I want my major displayed on my diploma because thats what I worked for not just a generic degree.

While I would like it to say marine biology it's not super important to me. I just feel it is more of an accurate reflection of what I learned at the university.

I can get a diploma that says 'biology' from almost any school. I worked hard to have one that specifically says marine on it.

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Explain why you think it is or is not important that your diploma states "M...

Having the diploma state what you focused on is very important, since Biology is so broad. Also it seems like the Marine Biology track has the least classes to choose from every semester. For instance, according to the BioAdvise website, next fall there are 18 total classes for Marine Biology, while there are 36 classes available for Integrated Animal Biology-Animal Track majors. So the distinction is needed. Lastly, listing the completed degree as Marine Biology on the resume/CV would also be nice.

Biology is not as direct or understanding of what specific branch was studied. Marine Biology states the interest in learning about all things MARINE related and not necessarily cellular or medical.

Not really important bc a lot of the electives I took were not marine bio based they were simple iab electives

I have specialized in marine biology for a reason, and my diploma should reflect that.

Shows an emphasis in marine subjects. Biology is general but marine shows a specialty

Because a specification for Marine Sciences is an important title when applying for certain positions at jobs and internships.

I feel that saying I have a biology degree and focused on marine biology sounds more broad than saying I have a degree in marine biology. One implies I studied all of biology and took a few electives in marine life. The other represents the fact that I used have focused extensively on understanding the unique adaptations, ecosystems and processes found in the marine environment. That distinction is important to me.

It is important that my diploma says Marine Biology because the courses I have taken reflect the specific field of Marine Biology and I want my diploma to accurately represent my selected degree.

While I am doing marine biology, I was also interested in other types of biology

I specifically wanted a marine biology degree. It is why I came to this school. It was close to where I live and offered something more specific than just biology. I am planning on working in a field with marine mammals so it is very important to me have a degree that says marine on it.

It is important because I am specializing in a certain part of biology, rather than just being categorized in a general biology degree.

To me the difference and importance between having marine versus not is who we concentrate our education and research on. There are so many people out there that focus on biology in a general sense but not a lot focus on marine life.

Biology majors, while they have the option to take marine biology classes, do not necessarily focus on marine bio classes. My degree related to marine biology is more important to me than a general biology degree, and I would not have chosen USF as my first choice without the option of a credible marine biology degree. Had I wanted to pursue a general biology degree, it would have affected me choosing USF as well. There aren't as many undergraduate options for marine biology degrees in public universities in Florida, and especially after completing a marine biology degree and being focused on this field and those graduation requirements, I would definitely want my future diploma to list marine biology.

I believe that if you are applying for jobs that are specific to marine biology, it can be helpful to show that you have that specification. Because marine biology students are required to take a few specific classes, it is a different degree then just plain biology.

I feel that since my passion truly is with marine biology, and I put the work into it, I'd like my diploma to reflect that as well

I simply believe that there needs to be more marine scientists in the world. With the inevitable problems we will be facing and already are facing, I think it is important that we have more people looking for solutions and raising awareness so that the needed global effort towards change can start to take effect. I am very passionate about marine conservation. I want to learn as much as I can and have a career in that field so that I can make the change I feel like I was born to make.

Board of Trustees Regular Meeting - New Business - Consent Agenda

Explain why you think it is or is not important that your diploma states "M...

I think it is important because I came to school specifically for marine biology. If I wanted a biology degree I would have applied to USF as a biology major. I have spent the last three years and will spend the last year taking marine biology classes for that specific degree, so I expect to graduate with a diploma that defines what I studied. I am not a biology student with a concentration of marine biology, I am a marine biology student with a concentration on animals. So trying to change the degree is basically saying that the whole time I have been here as a marine biology student was not important and frankly disregarded. This is concerning and to put bluntly kind of stupid to change, we should graduate with the diploma of the subject we studied. If you are going to change it and have marine biology students graduate with just a biology degree then you should just get rid of the marine biology department all together and have incoming students just apply for the biology department and take it upon themselves to take marine classes if they want that focus. Either way I think that changing the diploma title is not needed and should not be done.

I came to USF for marine biology not biology

Because this is something I've been working towards since I was 8 and for me to graduate without a degree in marine biology would mean that I wasn't able to live out my dreams. I mostly care because I fell in love with studying the oceans, not about all of biology in general and also because water related environmental issues mean the most to me. I hope that makes sense.

I chose to come to USF because of the credibility of having an actual Marine Biology program rather than a biology degree with a concentration in Marine Biology. I think it is extremely important for future jobs that the degree on my diploma is actually Marine Biology.

Because I transferred to USF to study marine biology and since I have spent most of my time taking marine biology electives, it reflects more on my time spent here as having a marine biology degree. I want to go on to graduate school to do marine biology research and would rather say I have a degree in marine biology than biology.

I would want it to be very clear that I studied animal biology rather than human biology considering I am looking to work in the animal field. Also, the kinds of courses I had to take to earn MARINE biology versus regular biology, I would hope there would be a distinguishing difference on my diploma. If you aren't going to put "marine biology" on my diploma, then what was the point of taking specific courses?

I came to USF specifically for its opportunity and its credibility in marine biology research. If I wanted a biology degree only, I would have elected a degree in biology and not marine biology and probably gone elsewhere, not USF specifically. I want my \$50k piece of paper to say Marine Biology because I studied this field specifically. please do not change this.

Because I want a degree in a specialized field of biology

Because I want to be known as a Marine Biologist. If I get a degree in biology I would just be known as a regular biologist. Being known as a marine biologist will help me with a career involving marine biology.

I would like my diploma to reflect the degree I have earned. If I have taken classes in Marine Biology and that is my speciality then my diploma should match what I have learned and what my skill set is in.

I switched majors to get a "Marine Biology" Degree not a degree in biology with a marine biology concentration. It would be kind of a slap in the face to consolidate my degree into a more general degree.

I came to this school specifically because many other schools do not offer complete "Marine Biology" degrees and instead offer "Biology" degrees with a track in Marine Biology. It would have been a complete waste coming here if my degree doesn't say Marine Biology.

Biology is a very broad subject that contains many different areas of study. I would like that my diploma specifies that I have taken classes on and studied marine-specific biology as opposed to something such as molecular biology. The specificity would help me get hired at places where I would like to have a career such as an aquarium or other facility where marine biology would be preferred over a general biology degree.

I believe it is important that my diploma states Marine Biology because I want to have a job focusing in marine biology and I have worked really hard towards my marine biology degree.

Biology is quite open-ended when it comes to a degree. The way I see it, I'm interested in studying marine organisms, specifically. Nothing else really peaks my interests.

Board of Trustees Regular Meeting - New Business - Consent Agenda

Explain why you think it is or is not important that your diploma states "M...

Because my time was spent studying Marine Biology. It was a specific choice and i put work and time in to learning specifically about marine related biology.

I hadn't really thought about this much but I can see the pros and cons. I think I would like if it stated marine biology because this is what I focused on and was working towards so I would like my diploma to reflect this. However just stating biology gives my undergrad degree a wider range of possible future opportunities. Though I do lean closer to it saying marine biology overall.

It shows a specialty area.

Being a "Marine Biologist" is my dream, not just simply a "Biologist"

When the diploma clearly states marine biology, it clarifies our specific area of study we focused on, in our college career. This could be more appealing for potential employers within the marine science community.

Because marine biology is a concentration while biology is a general term that could be used for any biology degree

Biology is a very general term, I came to this school to specifically study MARINE biology and to have MARINE biology on my transcript. I would not go here to simply obtain a 'biology' degree.

I completed a marine biology major

It is very important as specific Marine Biology graduate programs require a specific degree in Marine Biology. If you take that away, you take away future grad school and career opportunities

Shows what your area of interest is specifically and what you have been focusing you classes and gain of knowledge on.

I believe there are different implications with biology vs marine biology. If someone told me they majored in biology I would assume they're trying to go into the medical field, but if they said marine biology I would assume they're trying to go into ecology, conservation or something more along those lines

I did not attend the University of South Florida for a Biology degree.

I want my focus for my future career to be strictly in the marine biology department and not the biology department. i want to focus and specialize only on marine life and ecosystems rather than all life.

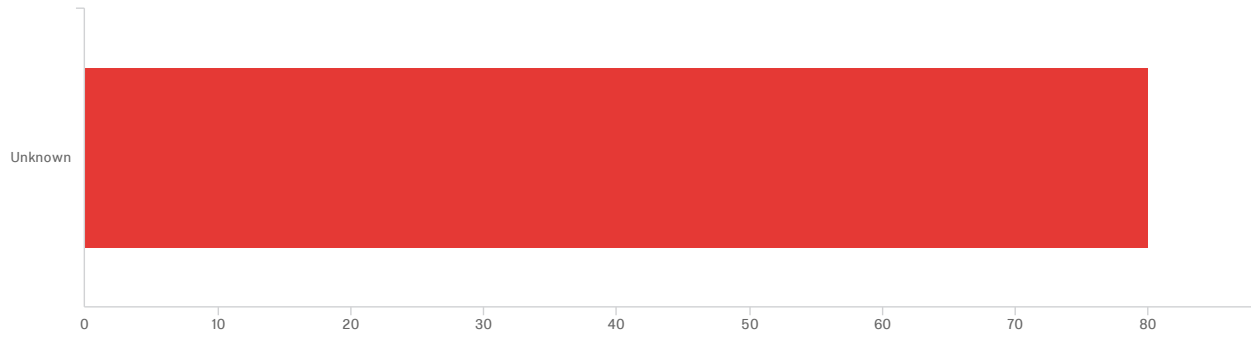
I don't think that it makes the diploma less credible, but someone pursuing Marine biology fields may want it to be focused.

I am transferring schools and switching to a different field, so to me it is not important. While I was still on the marine biology path, I would have said it was very important.

I did all the extra courses for marine biology so I would like my diploma to reflect that.

I actually chose the University of South Florida over other schools in Florida because there is an actual Marine Biology program here. I would like to be able to show future employers in the Marine Biology field that I have an educational background in the field.

Q2 - Topics



#	Field	Choice Count
1	Unknown	100.00% 80

Showing rows 1 - 1 of 1

End of Report

Appendix C: Letter of Support

UNIVERSITY OF MIAMI
ROSENSTIEL
SCHOOL of MARINE &
ATMOSPHERIC SCIENCE



Marine Biology and Ecology
4600 Rickenbacker Causeway
Miami, Florida 33149-1031

Ph: 305-421-4176
Fax: 305-421-4600

To: Valerie J. (Jody) Harwood, Ph.D.
Chair and Professor
Department of Integrative Biology
University of South Florida

Re: New degree in Marine Biology

As Chair of the Department of Marine Biology and Ecology at the University of Miami, I am writing in support of the University of South Florida's proposed new BS degree in Marine Biology. We do not anticipate that our Marine Biology BS program at University of Miami will be impacted by USF's proposed program due to the geographic separation of our institutions and the high demand for the Marine Biology degree.

Career opportunities for graduates in Marine Biology are robust and increasing, and many of these students go on to graduate degrees. We wish USF success in implementing this program

Sincerely,

A handwritten signature in black ink, appearing to read 'Martin Grosell'.

Martin Grosell, PhD
Maytag Professor of Ichthyology
RSMAS, University of Miami, Florida
Phone: +1 305 505 6897
Email: mgrosell@rsmas.miami.edu
Webpage: <http://grosell-lab.rsmas.miami.edu/>



Department of Biology
11000 University Parkway
Building 58, Office 79
Pensacola, FL 32514

August 24th, 2019

Dear Dr. Harwood,

As Chair of the Department of biology at the University of West Florida, I am writing in support of the University of South Florida's proposed new BS degree in Marine Biology. We do not anticipate that our Marine Biology BS program at UWF will be impacted by USF's proposed program due to the geographic separation of our institutions and the demand for the Marine Biology degree. Career opportunities for graduates in Marine Biology are robust and increasing, and many of these students go on to graduate degrees. We wish USF success in implementing this program and look forward to collaborating on field courses and other matters as they arise.

Sincerely,

A handwritten signature in black ink that reads "Peter Cavnar".

Peter Cavnar
Associate Professor and Department Chair
Department of Biology

Appendix C: Letter of Support



November 14, 2019

Dr. Ralph C. Wilcox
Provost and Executive Vice President
University of South Florida
4242 East Fowler Avenue, CGS 401
Tampa, FL 33620

Dear Provost Wilcox:

Thank you for the opportunity to review the proposed BS Marine Science (26.1302). As stated at the CAVP Academic Review Group on April 23, 2019, Florida International University has no objections to USF creating a new degree program in this field. We recognize this represents transitioning current majors/concentrations to a stand-alone degree.

As FIU continues to work within the Florida Consortium of Metropolitan Research Universities with your institution, we look forward to following your success in the degree implementations and continuing our collaborative efforts.

Sincerely,

A handwritten signature in blue ink, appearing to read "Kenneth G. Furton".

Kenneth G. Furton
Provost and Executive Vice President

Kenneth G. Furton
Provost and Executive Vice President
Modesto A. Maidique Campus, PC 526, 11200 SW 8 Street, Miami, FL 33199
Tel 305-348-2151 • Fax 305-348-2994 • provost.fiu.edu

Appendix D: Academic Learning Compact

B.S. Marine Biology

CIP Code: 26.1302

Mission Statement

The faculty in the Department are committed to understanding the basic principles of biology and applying this knowledge to: 1) address issues of contemporary concern, 2) explore new applications of research and 3) provide students with a comprehensive training in the biological sciences that prepares them for professional endeavors. Research and teaching in the Department emphasizes a modern interdisciplinary approach to understand the interactions across many levels of biological organization – from cells to organisms to populations to communities to landscapes. Faculty research and teaching span a variety of interests of increasing global importance including: marine and freshwater ecology; restoration ecology; population ecology; evolution; plant-animal interactions; community ecology; plant genetics and systematics; conservation biology; ecotoxicology; biomechanics and functional morphology; environmental microbiology; and microbial physiology.

Goal 1: Discipline Specific Knowledge and Skills

1a. Student Learning Outcome Statement

Describe the processes by which organisms evolve and how they apply to marine ecosystems.

2a. Student Learning Outcome Statement

Explain major ecological relationships among marine organisms and their environments.

3a. Student Learning Outcome Statement

Explain the diversity of marine life including the diversity of their forms and functions.

4a. Student Learning Outcome Statement

Explain the value of biodiversity, the major threats to marine biodiversity, and the current thinking in approaches to conservation of biodiversity.

Goal 2: Critical Thinking

1a. Student Learning Outcome Statement

Students will be able to analyze and interpret findings from the scientific literature.

Goal 3: Communication Skills

1a. Student Learning Outcome Statement

Students will be able to communicate the results of scientific analyses investigating problems in marine biology.

Appendix E: Semester Plans

<p><u>Undergraduate Eight-Semester Plan</u> CIP Code: 26.1302 CIP Title: Marine Biology and Biological Oceanography Degree Level: B</p>
<p>Credential (Degree Type): B.S.</p>
<p>USF Title (Major Name): Marine Biology</p>

For any course and/or placeholder that must be taken in sequence and/or in the semester listed, please indicate such by inserting a (!) in the appropriate cell.

Fall 1								
!	Current Course Prefix and Number	State Mandated Common Prerequisite	General Education Requirement	Supporting Course	Major Course	Major Restricted Elective	Unrestricted Elective	Total
	ENC 1101		✓					3
!	BSC 2010	✓	✓					3
!	BSC 2010L	✓						1
!	CHM 2045	✓						3
	CHM 2045L	✓						1
	Social Sciences		✓					3
Take the Civics Literacy Exam (Graduation Requirement)								0
Total Semester Credit Hours:								14

Spring 1								
!	Current Course Prefix and Number	State Mandated Common Prerequisite	General Education Requirement	Supporting Course	Major Course	Major Restricted Elective	Unrestricted Elective	Total
	ENC 1102		✓					3
!	BSC 2011	✓						3
!	BSC 2011L	✓						1
!	CHM 2046	✓						3
	CHM 2046L	✓						1
	MAC 2241	✓	✓					3
Total Semester Credit Hours:								14

Appendix E: Semester Plans

Summer 1								
	Current Course Prefix and Number	State Mandated Common Prerequisite	General Education Requirement	Supporting Course	Major Course	Major Restricted Elective	Unrestricted Elective	Total
	MAC 2242 or STA 2023	✓	✓					3
	XXX XXXX						✓	3
Total Semester Credit Hours:								6

Fall 2								
	Current Course Prefix and Number	State Mandated Common Prerequisite	General Education Requirement	Supporting Course	Major Course	Major Restricted Elective	Unrestricted Elective	Total
	CHM 2210	✓						3
	CHM 2210L	✓						2
	PHY 2048 or PHY 2053			✓				3
	PHY 2048L or PHY 2053L			✓				1
	Humanities		✓					3
	Human and Cultural Diversity		✓					3
Total Semester Credit Hours:								15

Spring 2								
	Current Course Prefix and Number	State Mandated Common Prerequisite	General Education Requirement	Supporting Course	Major Course	Major Restricted Elective	Unrestricted Elective	Total
	Information and Data Literacy		✓					3
	CHM 2211	✓						3
	CHM 2211L	✓						2
	PHY 2049 or PHY 2054			✓				3
	PHY 2049L or PHY 2054L			✓				1
Total Semester Credit Hours:								12

Appendix E: Semester Plans

Summer 2								
!	Current Course Prefix and Number	State Mandated Common Prerequisite	General Education Requirement	Supporting Course	Major Course	Major Restricted Elective	Unrestricted Elective	Total
	Creative Thinking		✓					3
Total Semester Credit Hours:								3

Fall 3								
!	Current Course Prefix and Number	State Mandated Common Prerequisite	General Education Requirement	Supporting Course	Major Course	Major Restricted Elective	Unrestricted Elective	Total
	BSC 3312				✓			3
	PCB 3043				✓			3
	PCB 3043L				✓			1
	PCB 4674				✓			3
	XXX XXXX Upper Level						✓	3
Total Semester Credit Hours:								13

Spring 3								
!	Current Course Prefix and Number	State Mandated Common Prerequisite	General Education Requirement	Supporting Course	Major Course	Major Restricted Elective	Unrestricted Elective	Total
	PCB 3063				✓			3
	PCB 3063L				✓			1
	Marine Biology Structures Elective					✓		4
	Marine Biology Capstone Elective					✓		3
	XXX XXXX						✓	3
Total Semester Credit Hours:								14

Summer 3								
!	Current Course Prefix and Number	State Mandated Common Prerequisite	General Education Requirement	Supporting Course	Major Course	Major Restricted Elective	Unrestricted Elective	Total
Recommendation: Internship or Research Opportunity								0
Total Semester Credit Hours:								0

Appendix E: Semester Plans

Fall 4								
!	Current Course Prefix and Number	State Mandated Common Prerequisite	General Education Requirement	Supporting Course	Major Course	Major Restricted Elective	Unrestricted Elective	Total
	Marine Biology Capstone Elective					✓		3
	Marine Biology Elective (Capstone, Structures, Ecology and Ecosystems or Field Studies)					✓		3
	Marine Biology Ecology and Ecosystems Elective					✓		3
	Ethical Reasoning and Civic Engagement		✓					3
	High Impact Practice		✓					3
Total Semester Credit Hours:								15

Spring 4								
!	Current Course Prefix and Number	State Mandated Common Prerequisite	General Education Requirement	Supporting Course	Major Course	Major Restricted Elective	Unrestricted Elective	Total
	XXX XXXX Upper Level				✓			3
	Marine Biology Elective (Capstone, Structures, Ecology and Ecosystems or Field Studies)					✓		3
	Marine Biology Field Studies Elective					✓		4
	XXX XXXX						✓	4
Total Semester Credit Hours:								14

Total Program Hours:								120
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Appendix E: Semester Plans

Undergraduate Four-Semester Plan								
CIP Code: 26.1302								
CIP Title: Marine Biology and Biological Oceanography								
Degree Level: B								
Credential (Degree Type): B.S.								
USF Title (Major Name): Marine Biology								
Fall 1								
!	Current Course Prefix and Number	State Mandated Common Prerequisite	General Education Requirement	Supporting Course	Major Course	Major Restricted Elective	Unrestricted Elective	Total
	PHY 2048 or PHY 2053			✓				3
	PHY 2048L or PHY 2053L			✓				1
	BSC 3312				✓			3
	PCB 3043				✓			3
	PCB 3043L				✓			1
	XXX XXXX Upper Level						✓	3
Total Semester Credit Hours:								14

Spring 1								
!	Current Course Prefix and Number	State Mandated Common Prerequisite	General Education Requirement	Supporting Course	Major Course	Major Restricted Elective	Unrestricted Elective	Total
	PHY 2049 or PHY 2054			✓				3
	PHY 2049L or PHY 2054L			✓				1
	PCB 3063				✓			3
	PCB 3063L				✓			1
	Marine Biology Ecology and Ecosystems Elective					✓		3
	Marine Biology Structures Elective					✓		4
Total Semester Credit Hours:								15

Summer 1								
!	Current Course Prefix and Number	State Mandated Common Prerequisite	General Education Requirement	Supporting Course	Major Course	Major Restricted Elective	Unrestricted Elective	Total
Recommendation: Internship or Research Opportunity								0

Appendix E: Semester Plans

Total Semester Credit Hours:	0
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Fall 2								
!	Current Course Prefix and Number	State Mandated Common Prerequisite	General Education Requirement	Supporting Course	Major Course	Major Restricted Elective	Unrestricted Elective	Total
	Marine Biology Capstone Elective					✓		3
	Marine Biology Elective (Capstone, Structures, Ecology and Ecosystems or Field Studies)					✓		3
	PCB 4674				✓			3
	Marine Biology Capstone Elective		✓			✓		3
	XXX XXXX						✓	3
Total Semester Credit Hours:								15

Spring 2								
!	Current Course Prefix and Number	State Mandated Common Prerequisite	General Education Requirement	Supporting Course	Major Course	Major Restricted Elective	Unrestricted Elective	Total
	XXX XXXX Upper Level				✓			3
	Marine Biology Elective (Capstone, Structures, Ecology and Ecosystems or Field Studies)					✓		3
	Marine Biology Field Studies Elective					✓		4
	XXX XXXX						✓	3
	XXX XXXX						✓	3
Total Semester Credit Hours:								16

Total Program Hours:	60
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Appendix F: Faculty CVs

Chantale Bégin

Senior Instructor

Department of Integrative Biology

cbegin@usf.edu; 727-687-9701

EDUCATION

2008-2012 PhD in Biology, Simon Fraser University (BC); Advisor: Isabelle Côté
 2000-2002 MSc in Biology, Université Laval (QC); Advisor: Ladd Johnson
 1996-1999 BSc in Marine Biology, Dalhousie University (NS); Advisor: Bob Scheibling

TEACHING EXPERIENCE

2017-present **Senior Instructor**, Biology, University of South Florida—Tampa, FL
 2013-2017 **Instructor**, Biology, University of South Florida—Tampa, FL
 2012-2013 **Visiting Instructor**, Biology, University of South Florida—Tampa, FL
 2013-2018 **Educational Consultant**, Shellback Ocean Enterprises—Palm Harbor, FL
 Summer 2012 **Instructor**, Marine Biology, Nunavut Arctic College—Pond Inlet, NU, Canada
 2003-2008 **Marine Science Instructor & Program Manager**, Sea | mester—Sarasota, FL

AWARDS

- University of South Florida College of Arts and Sciences Dean’s Teaching Excellence Award, 2019
- University of South Florida Global Citizen’s Project Faculty Fellowship, 2019
- University of South Florida Outstanding Undergraduate Teaching Award, 2015 & 2018
- University of South Florida STEM Scholar Award, 2018
- University of South Florida Certificate of Global Achievement, 2018
- Simon Fraser University Graduate Fellowship, 2011 & 2012
- Simon Fraser University President’s Research Stipend, 2011
- National Science and Engineering Research Council (NSERC) Alexander Graham Bell D-2 Canada Graduate Scholarship, 2008-2010
- NSERC Michael-Smith Foreign Study Scholarship Supplement, 2009
- NSERC Postgraduate Scholarship A, 2000-2002
- Fisheries and Oceans Canada (DFO) Postgraduate Scholarship Supplement, 2001
- Dalhousie Marine Biology Medal, 2000
- Dalhousie Dr. Ming Fang Li Memorial Prize, 1999
- NSERC Undergraduate Summer Research Award, 1999
- Dalhousie Scholarship, 1997 and 1999

GRANTS

- USF STEER grant (\$6,500), 2019: Developing in-class and online resources to flip BSC 2011 Biological Diversity and maximize the use of Learning Assistants (co-PIs: Chris Osovitz, Amber Brace, Drew Kramer)
- National Geographic (\$13,075), 2018-2019: Accurately assessing the sedimentary environment of coral reefs in the Eastern Caribbean across a range of coastal development
- Telluray Foundation (\$10,000), 2017-2018: Linking long-term changes in sedimentation, modern sedimentation rates and coral reefs in the eastern Caribbean.
- USF STEER grant (\$12,000), 2017: Improving learning gains in introductory biology through repeated testing (co-PIs: Christopher Osovitz, William Brazelle, Eric Sikorski)
- USF STEER grant (\$6,000), 2016: Building a strong math foundation for biology at the University of South Florida and Hillsborough Community College (co-PI: Val Mohanakumar)
- NOAA Coral Reef Conservation Grant (\$18,000), 2009-2011: Effects of protection and sediment stress on coral reefs in Saint Lucia (Co-PI: Isabelle Côté)
- NOAA Coral Reef Conservation Grant (\$14,004) 2006-2008: Population dynamics of elkhorn coral *Acropora palmata* in the eastern Caribbean; Co-PI (PI: Margaret Miller)
- PADI Project Aware Foundation Grant (\$1,000), 2001: Invertebrate communities associated with macroalgal stands in the northern Gulf of St. Lawrence (co-PIs: Ladd Johnson and John Himmelman)

PUBLICATIONS

♦ undergraduate researcher

* publications based on data collected by undergraduate students in marine biology courses

- Shea L♦, **Bégin C**, Osovitz C, Prevost L, In Review. Comparison of Student Success Between High Clicker and Low Clicker Frequency in a Large-Enrollment Introductory Biology Course. Submitted to the Journal of Microbiology and Biology Education.
- **Bégin C**, Schelten CK, Nugues MM, Hawkins J, Roberts C, Côté IM, 2016. Effects of Protection and Sediment Stress on Coral Reefs in Saint Lucia. PLOS ONE 11(2): e0146855. doi:10.1371/journal.pone.0146855
- **Bégin C**, Brooks G, Larson R, Dragičević S, Ramos Scharron CE, Côté IM, 2014. Increase in sediment loads over coral reefs in Saint Lucia in relation to changes in land use in contributing watersheds. Ocean and Coastal Management 95:35-45*
- **Bégin C**, Wurzbacher J, Côté IM, 2013. Variation in benthic communities of eastern Caribbean coral reefs in relation to surface sediment composition. Marine Biology 160:343-353*
- Kramer KL, Williams DE, Miller MW, **Bégin C**, Fry J, Valdivia A, 2009. Demographic comparison of the threatened coral species, *Acropora palmata*, in the eastern Caribbean. Proceedings of the 11th International Coral Reef Symposium 2008 in Fort Lauderdale, FL*
- **Bégin C**, Johnson LE and Himmelman JH, 2004. Macroalgal canopies: distribution and diversity of associated invertebrates and effects on the recruitment and growth of mussels. Marine Ecology Progress Series 271: 121-132
- Miller MW, McClellan D and **Bégin C**, 2003. Observations on fisheries activities at Navassa Island. Marine Fisheries Review. 65: 43-49
- **Bégin C** and Scheibling RE, 2003. Growth and survival of the invasive green alga *Codium fragile* ssp. *tomentosoides* in tide pools on a rocky shore in Nova Scotia. Botanica Marina 46:404-412

Christopher J Osovitz, Ph.D.

Curriculum vitae

Master Instructor and Undergraduate Coordinator
Department of Integrative Biology
Phone: 813-974-9109
osovitz@usf.edu

EDUCATION:

- 2007 **Doctor of Philosophy**, Department of Ecology, Evolution and Marine Biology, University of California. Santa Barbara, CA
Thesis topic: *Molecular and Physiological Ecology of Sea Urchins*
- 2001 **Bachelor of Science degree, with honors**, Department of Zoology, University of Florida. Gainesville, FL
- 1999 **Associate of Arts degree, high honors**
Daytona Beach Community College. Daytona Beach, FL
- 1997 **High school diploma**
Seabreeze High School. Daytona Beach, FL

PROFESSIONAL EXPERIENCE:

- 2018-Present **Master Instructor** (Instructor III), Department of Integrative Biology, University of South Florida
- 2014-2018 **Senior Instructor** (Instructor II), Department of Integrative Biology, University of South Florida
- 2016-Present **Undergraduate Coordinator**, Department of Integrative Biology
- 2009-2014 **Instructor** (Instructor I), Department of Integrative Biology, University of South Florida
- 2008-2009 **Lecturer**, Department of Biology, University of Florida
- 2008 **Post-Doctoral Fellow**, Supervisor: Dr. Gretchen Hofmann, University of California Santa Barbara / Stanford University
- 2001-2002 **Research Technician**, Supervisor: Dr. David Julian, University of Florida

TEACHING EXPERIENCE:

Formal University Education at USF:

- Instructor: BSC 3312, **Marine Biology**, University of South Florida
- Instructor: ZOO 3205C, **Advanced Invertebrate Zoology**, University of South Florida
- Instructor: PCB 3712, **General Physiology**, University of South Florida
- Instructor: BSC 1005, **Principles of Biology (for non-majors)**, University of South Florida
- Instructor: BSC 1005, **Principles of Biology (for non-majors)**, University of South Florida, *Summer ACE Program Study abroad*
- Instructor: PCB 4937, **Seminar in Marine Biology**, University of South Florida
- Instructor: BSC 2011, **Biological Diversity**, University of South Florida
- Instructor: BSC 4910, **Undergraduate Research** (directed individual study), University of South Florida

Instructor: BSC 4933, **Lectures in Contemporary Biology**, University of South Florida

Developer and Instructor: BSC 1005, **Principles of Biology (for non-majors) online delivery**, University of South Florida

Co-developer: BSC 2011, **Online knowledge and skills component for Bio II: Biological Diversity**, University of South Florida

AWARDS, GRANTS, AND FELLOWSHIPS:

2017	STEM Institute Scholars Teaching Award, University of South Florida
2017	USF STEER collaborative grant recipient. Improving learning gains in introductory biology through repeated testing. (\$12,000)
2016	USF STEER collaborative grant recipient. Improving links between math courses and subsequent science courses. (\$7,000)
2014-2019	Co-author and collaborator. HHMI Undergraduate Science Education Grants to Research Universities (\$1,200,000)

PRESENTATIONS:

January 2018	Poster presentation. <i>Does active learning improve student success if the course is highly structured?</i> Sunshine State Teaching and Learning Conference, St. Petersburg Beach, FL
October 2010	Department seminar. <i>Building a CV for a Career in College Education</i> . Integrative Biology, University of South Florida
October 2009	Department seminar. <i>Geographic Patterns of Gene Expression in Pacific Sea Urchins</i> . Integrative Biology, University of South Florida

FACULTY LEARNING COMMUNITY (FLC) PARTICIPATION:

2015-2019	Member , Automated analysis of constructed response research group FLC
2015-2016	Member , Florida Consortium of Metropolitan Universities, Biology FLC, sponsored by the Helmsley Foundation
2014	Member , Transforming STEM Education FLC. University of South Florida
2011-2013	Member , Science, Technology, Engineering and Math FLC. University of South Florida

CONFERENCES AND WORKSHOPS ATTENDED:

February 2019:	STEM Engaged Teaching Workshop, USF, Tampa, FL
September 2018:	Seeking Synergy: K-12 Professional Development as a Model for College Science Faculty Conference, Boulder, CO
April 2018:	STEM High Impact Educational Practices Workshop, USF, Tampa, FL
January 2018:	Sunshine State Teaching and Learning Conference, St. Petersburg Beach, FL

Ryan Carney

Department of Integrative Biology, University of South Florida
4202 E. Fowler Ave, SCA 110, Tampa, FL 33620
ryancarney@usf.edu | (510) 978-8875

Professional Preparation

UC Berkeley	Berkeley, CA	Integrative Biology	BA (Honors)	2003
UC Berkeley	Berkeley, CA	Art Practice	BA	2003
Yale School of Medicine	New Haven, CT	Epidemiology	MPH	2010
Yale School of Management	New Haven, CT	Technology	MBA	2010
Brown University	Providence, RI	Ecology & Evolutionary Biology	MS	2013
Brown University	Providence, RI	Ecology & Evolutionary Biology	PhD	2016

Appointments

2016 – present	University of South Florida, Assistant Professor of Digital Science
2011 – 2014	National Science Foundation, Graduate Research Fellow
2011 – 2012	Brown University Medical School; Graduate Teaching Assistant, Human Anatomy
2009	Yale University, Graduate Teaching Fellow
2009	Google, Intern
2008	Centers for Disease Control, Graduate Fellow
2004 – 2007	CA Dept. Public Health; Coordinator, West Nile Virus Dead Bird Surveillance Program
2005	UC Berkeley, Digital Sculpture T.A./Laser Scanner Technician
2002 – 2004	UC Berkeley, Staff Research Associate, Insect Biology (Lyme Disease Lab)

Products

Total citations: 714 h-index: 12

1. **Carney RM**, Ahearn SC, McConchie A, Glaser C, Jean C, Barker C, Park B, Padgett K, Parker E, Aquino E, Kramer V. (2011). Early warning system for West Nile virus risk areas, California, USA. *Emerging Infectious Diseases* 17(8):1445-54. <http://wwwnc.cdc.gov/eid/article/17/8/pdfs/10-0411.pdf>
2. **Carney RM**, Husted S, Jean C, Glaser C, Kramer V. (2008). Efficacy of aerial spraying of mosquito adulticide in reducing incidence of West Nile virus in humans, Sacramento County, California, 2005. *Emerging Infectious Diseases* 14(5):747-54. wwwnc.cdc.gov/eid/article/14/5/pdfs/07-1347.pdf
3. **Carney RM**. (2010). GIS-based early warning system for predicting high-risk areas of dengue virus transmission, Ribeirão Preto, Brazil. Masters Thesis, *Yale University*. (**winner of Dean's Prize for Outstanding Thesis**). <http://gradworks.umi.com/14/80/1480349.html>
4. Leandro-Reguillo P, Panaou T, **Carney R**, Jacob BG. 2017. Fuzzification of multi-criteria proxy geoclassifiable vegetation and landscape biosignature estimators to predict the potential invasion of *Aedes aegypti* in Barcelona, Spain. *International J. of Geographic Information System* 4(2):1-19.
5. Reisen WK, Barker CM, **Carney R**, Lothrop HD, Wheeler SS, Wilson JL, Madon MB, Takahashi R, Carroll B, Garcia S, Fang Y, Shafii M, Kahl N, Ashtari S, Kramer V, Glaser C, Jean C. 2006. Role of corvids in epidemiology of West Nile virus in southern California. *Journal of Medical Entomology* 43(2):356-67.

Five Other Significant Products:

1. **Carney RM**. 2016. Evolution of the archosaurian shoulder joint and the flight stroke of *Archaeopteryx*. PhD Dissertation, *Brown University*. <https://search.library.brown.edu/catalog/bdr:674243>

2. **Carney RM**, Vinther J, Shawkey MD, D'Alba L, Ackermann J. (2012). New evidence on the colour and nature of the isolated *Archaeopteryx* feather. *Nature Communications* 3:637.
<http://www.nature.com/ncomms/journal/v3/n1/abs/ncomms1642.html>
3. Lindgren J, Sjövall P, **Carney RM**, Uvdal P, Gren JA, Dyke G, Schultz BP, Shawkey MD, Barnes KR, Polcyn MJ. (2014). Skin pigmentation provides evidence of convergent melanism in extinct marine reptiles. *Nature* 506(7489):484–8.
<http://www.nature.com/nature/journal/v506/n7489/full/nature12899.html>
4. Lindgren J, Sjövall P, **Carney RM**, Cincotta A, Uvdal P, Hutcheson SW, Gustafsson O, Lefèvre U, Escuillié F, Heimdal J, Engdahl A, Gren JA, Kear BP, Wakamatsu K, Yans J, Godefroit P. (2015). Molecular composition and ultrastructure of Jurassic paravian feathers. *Scientific Reports* 5:13520.
<http://www.nature.com/articles/srep13520>
5. Schwarz D, Kundrát M, Tischlinger H, Dyke G, **Carney RM**. Ultraviolet light illuminates the avian nature of the Berlin *Archaeopteryx* skeleton. *Scientific Reports* (2019, *in press*).

Synergistic Activities

1. **Development of Research Tools.** As PI for the California DYCAST Program, I raised \$200K and then developed and deployed -- on a statewide basis -- this real-time West Nile virus risk modeling system. This program was successful in reducing human disease (Carney et al 2011, Carney et al 2008), and was made available as open-source software on GitHub. I later used this software for my Masters of Public Health thesis, and modified the model to successfully predict epidemics of dengue fever in Brazil (Carney 2010). I also developed tools to visualize and analyze fossil anatomy using a novel implementation of geographic information systems (GIS) software (Carney 2008 *J. Vertebrate Paleontology*).
2. **Popular Press.** I take an active role in writing press releases, creating graphics, and directing/producing documentary footage for dissemination of research in various popular media. This is often coordinated with local TV and National Geographic, leveraging my role as a National Geographic Emerging Explorer. E.g.: a) My *Archaeopteryx* visualization appeared as a two-page spread in *National Geographic Magazine* (2018); b) my work on the color of the *Archaeopteryx* feather (Carney et al 2012) was featured in >140 articles from 30 countries, including *The New York Times*, *Nature*, and two popular science books. The related web video I co-produced received ~200K views within the first 4 mo. on the National Geographic website; c) I gave TED-style talks on my research at the National Geographic Explorers Symposia (2014, 2017), broadly disseminated online to hundreds of thousands of viewers; d) my symposium talk “*Archaeopteryx* in 4D” was selected by the Society of Vertebrate Paleontology for a press release and covered by outlets such as *Nature* and National Geographic. Our 2014 *Nature* paper was featured on the *Nature* homepage and mentioned on the issue’s cover, and covered in >30 articles from 7 countries.
3. **Science Education and Outreach.** Previous findings have been synthesized in formats understandable and useful to non-scientists, and integrated with educational activities, in order to communicate findings in a broader context and enhance the teaching and understanding of evolution. a) Findings from my *Archaeopteryx* research were incorporated into a number of elementary and undergraduate level science curricula, scientific illustrations, and the Wikipedia page for *Archaeopteryx*. b) I also contributed to National Geographic Learning/Cengage’s “Flight” unit of their global middle school curriculum (2016). This is targeted at ESL students, and includes populations and countries that are underrepresented in STEM. c) As part of National Geographic science outreach, I gave a keynote presentation at an educators’ conference in New Mexico (2016), and visited a 2nd grade classroom in Virginia (2017). d) I occasionally consult for, and have my work is featured in, various educational television programs and museum exhibits. e) I co-developed an augmented reality *Archaeopteryx* mobile app, which will be released worldwide through National Geographic in 2019.
4. **Innovations in Teaching and Training.** I have created and pioneered new lecture and lab curricula on a) digital and visualization methods in the biological sciences (*Digital Dinosaurs* course); pedagogical activities include integrating my research into educational tools, and utilizing next-generation 3D platforms such as virtual reality and augmented reality (HoloLens holographic computing) in the college classroom; and b) the novel integration of GIS and augmented reality, for a guest lecture and exercises in two graduate courses at the USF College of Public Health.

KATHLEEN M. SCOTT, Ph.D.

Associate Professor

Department of Biology

813/974-5173

kmscott@usf.edu

Degrees

- Ph.D. Biology. Pennsylvania State University at University Park, 1998.
- B.S. Microbiology /Molecular Biology. University of Michigan at Ann Arbor, 1991.

Thesis

- Ph.D. Inorganic carbon use by hydrothermal vent sulfur chemoautotrophic bacteria.

Research Interests

- Physiological ecology of chemolithoautotrophs.
- Marine and freshwater biogeochemistry.

Professional Experience

- Associate Professor, University of South Florida, August 2009-present.
- Assistant Professor, University of South Florida, August 2003-August 2009.
- Research Fellow, Harvard University, August 1998-August 2003.

Five Recent Relevant Publications

- Jessica H. Mitchell, Juliana M. Leonard, Jennifer Delaney, Peter R. Girguis, and **Kathleen Scott**. Hydrogen, hydrogenases, and energy generation by the chemoautotrophic symbionts of the deep-sea hydrothermal vent worm *Riftia pachyptila*. In revision.
- **Kathleen M. Scott**, et al. (2018) Genomes of ubiquitous marine and hypersaline *Hydrogenovibrio*, *Thiomicrothrix*, and *Thiomicrospira* spp. encode a diversity of mechanisms to sustain chemolithoautotrophy in heterogeneous environments. (2018) Authors include 35 USF undergraduate and 7 USF graduate students. *Environmental Microbiology* 20(8): 2686 – 2708. doi: 10.1111/1462-2920.14090.
- Mangiapia M., USF MCB4404L, Brown R. W., Hashemy Z, Keeley R., Leonard J., Mancera P., Nicholson, D., Wanjugi P, Zabinski T., Pan C., and **Scott K. M.** (2017) Proteomic and mutant analysis of the components of the CO₂ concentrating mechanism of a deep-sea chemolithoautotroph. *Journal of Bacteriology* 199(7): e00871-16. Selected by the editors as a 'Spotlight' article for this issue. USF MCB4404L includes 107 USF undergraduate coauthors. doi: 10.1128/JB.00871-16
- Boller A. J., Thomas P. J., Cavanaugh C. M., **Scott K. M.** (2015). Isotopic discrimination and kinetic parameters of RubisCO from the marine bloom-forming diatom *Skeletonema costatum*. *Geobiology* 13(1): 33-43. doi: 10.1111/gbi.12112.
- **Scott K. M.**, Dobrinski K., Boller A., Le Bris N. (2011). Response of hydrothermal vent vestimentiferan *Riftia pachyptila* to differences in habitat chemistry. *Marine Biology* 159:435-

Recent Relevant Grant Proposals Funded

- Integrative Organismal Systems, National Science Foundation. 2013-2016. \$320,000 to USF. Co-PI with Peter Girguis. “Collaborative Research: Environmental and internal influences on the relative activities of the Calvin-Benson-Bassham and reductive citric acid cycles”.
- USDA Cooperative State Research and Extension Service: US Department of Agriculture Higher Education Challenge Grants Program. 2008-2010. \$73,400. “Searching the deep sea for clues to enhance agricultural carbon fixation: An undergraduate research program to isolate, characterize, and sequence novel autotrophs”.
- JGI/DOE Community Sequencing Program. 9 genome sequences. “Thiomicrospiras: Ubiquitous sulfur-oxidizing autotrophs from an undersampled lineage of Gammaproteobacteria”.

Relevant Recent Presentations

- Invited presentation: “Surprising heterogeneity in mechanisms for inorganic carbon uptake and fixation by autotrophic gammaproteobacteria from hydrothermal vents and other sulfidic habitats”. Summer 2019, 8th Congress of European Microbiologists (FEMS2019), Glasgow, Scotland.
- J. Leonard, J. Panazarino, R. Beinart, J. Delaney, J. Sanders, **K. Scott**, and P. Girguis (2018). Redox substrates and autotrophic pathways of *Endoriftia persephone*, the gammaproteobacterial endosymbiont of vestimentiferan tubeworm *Riftia pachyptila*. Gordon Research Conference: The molecular basis of C1 metabolism.

Research Cruise Participation

- 2016: October 8 – 28, Clipperton Transform Fault, East Pacific Rise
- 2014: November 2 – November 27, Clipperton Transform Fault, East Pacific Rise
- 2007: December 25 – January 20, Clipperton Transform Fault, East Pacific Rise
- 1999: August 23 - September 6, Endeavor Segment, Juan de Fuca Ridge
April 15 - May 5, Clipperton Transform Fault, East Pacific Rise
- 1998: July 29 - August 9, Endeavor Segment, Juan de Fuca Ridge
- 1997: July 9 - 18, Louisiana Slope, Gulf of Mexico
September 6 - 27, Endeavor Segment, Juan de Fuca Ridge
- 1996: February 9 - March 27, Clipperton Transform Fault, East Pacific Rise
October 12 - 20, Endeavor Segment, Juan de Fuca Ridge
- 1995: March 21 - April 12, Clipperton Transform Fault, East Pacific Rise
July 8 - 20, Endeavor Segment, Juan de Fuca Ridge
September 18 - 30, Louisiana Slope, Gulf of Mexico
December 7 - 21, Clipperton Transform Fault, East Pacific Rise
- 1994: July 1 - 15, Endeavor Segment, Juan de Fuca Ridge
September 25 - October 5, Louisiana Slope, Gulf of Mexico (**Chief Scientist**)
November 6 - December 5, Clipperton Transform Fault, East Pacific Rise
- 1993: June 23 - July 14, Louisiana Slope, Gulf of Mexico
- 1992: March 23 - April 24, Clipperton Transform Fault, East Pacific Rise
May 22 - 27, Alaminos Canyon, Gulf of Mexico
August 9 - 22, Louisiana Slope, Gulf of Mexico

Stephen M Deban *Curriculum vitae*

Current Positions

Associate Professor, Department of Integrative Biology, **University of South Florida**,
August 2012-present.

Graduate Program Director, Department of Integrative Biology, **University of South
Florida**, August 2015-present.

Current Address and Contact Information

Department of Integrative Biology, 4202 East Fowler Avenue, SCA 110, University of South
Florida, Tampa, FL 33620, USA, sdeban@usf.edu, <http://debanlab.org>

Office Phone: 813-974-2242. Cell Phone: 813-454-8024

Research Focus

Evolution of the physiology and biomechanics of movement in animals.

Education

University of California Berkeley, Ph.D., Integrative Biology, 1991-1997, David B. Wake,
advisor.

Northern Arizona University, B.S., Biology, 1988-1991 *Summa cum laude*.

Previous Positions

Assistant Professor, Department of Biology, **University of South Florida**, Aug 2005-2012

Research Assistant Professor, Department of Biology, **University of Utah**, Oct 2004 - July
2005.

Postdoctoral Researcher, Department of Biology, **University of Utah**, Nov 1999 - Sept 2004.
David Carrier, mentor. Locomotor and ventilatory biomechanics and functional
morphology of vertebrates.

Postdoctoral Researcher, Department of Experimental Zoology, **University of Wageningen,
Netherlands**, Sept – Dec 2002. Johan van Leeuwen, mentor. Salamander tongue
projection mechanics.

Postdoctoral Researcher, Department of Biology, **University of Miami**, Sept – Dec 2001.
James O'Reilly, mentor. Amphibian functional morphology.

Postdoctoral Researcher, Brain Research Institute, **University of Bremen, Germany**, Apr –
Nov 1999. Gerhard Roth, mentor. Salamander feeding motor control.

Fellow, **Hanse Institute for Advanced Study, Germany**, Jan – Dec 1998. Gerhard Roth,
mentor. Salamander feeding motor control.

Grants and Fellowships

NSF Grant Award, “Evolution of a functionally robust, high-performance musculoskeletal system.” **Awarded \$452,744**, 2014-2018. Sole PI.

Proposal Enhancement Grant, USF Research and Innovation. **Awarded \$21,569**, June 2013.

NSF Grant Award, “Extreme performance at low temperature: ballistic tongue projection in salamanders and chameleons.” **Awarded \$237,728 + \$6,000 REU**, 2009-2012. Sole PI.

12 Recent Peer-Reviewed Publications (H-index: 25)

[†]undergraduate student, ^{*}graduate student, [°]postdoctoral student.

1. Scales, J.A., S.V. Bloom and S.M. Deban. Convergently evolved muscle architecture enables high-performance ballistic movement in salamanders. Submitted to *Journal of Morphology*.
2. Deban, S.M. and S.V. Bloom*. 2018. Ballistic tongue projection in a miniaturized salamander. *Journal of Experimental Zoology A*. 329: 62-71.
3. Olberding, J.P.* and S.M. Deban. 2018. Scaling of work and power in a locomotor muscle of a frog. *Journal of Comparative Physiology B*. 188: 623-634.
4. Olberding, J.P.*, J.A. Scales[°] and S.M. Deban. 2018. Movements of vastly different performance have similar underlying muscle physiology. *Journal of Experimental Biology*. 221, jeb166900.
5. Olberding, J.P.* and S.M. Deban. 2017. Effects of temperature and force requirements on muscle work and power output. *Journal of Experimental Biology*. 220: 2017-2025.
6. Scales, J.A.[°], M.K. O’Donnell* and S.M. Deban. 2017. Thermal sensitivity of motor control of muscle-powered versus elastically powered tongue projection in salamanders. *Journal of Experimental Biology*. 220: 938-951.
7. Stinson, C.M.* and S.M. Deban. 2017. Functional trade-offs in the aquatic feeding performance of salamanders. *Zoology*. 125: 69-78.
8. Stinson, C.M.* and S.M. Deban. 2017. Functional morphology of terrestrial prey capture in salamandrid salamanders. *Journal of Experimental Biology*. 220: 3896-3907.
9. Deban, S.M. and J.C. Richardson*. 2017. A peculiar mechanism of bite-force enhancement in lungless salamanders revealed by a new geometric method for modeling muscle moments. *Journal of Experimental Biology*. 220: 3588-3597.
10. Scales, J.A.[°], C.M. Stinson* and S.M. Deban. 2016. Extreme performance and functional robustness of movement are linked to muscle architecture: comparing elastic and non-elastic feeding movements in salamanders. *Journal of Experimental Zoology A*. 325A: 360–376.
11. Deban, S.M. and J.A. Scales. 2016. Dynamics and thermal sensitivity of ballistic and non-ballistic feeding in salamanders. *Journal of Experimental Biology*. 291: 431-444.
12. Anderson, C.V.*, N.P. Larghi* and S.M. Deban. 2014. Thermal effects on the performance, motor control and muscle dynamics of ballistic feeding in the salamander *Eurycea guttolineata*. *Journal of Experimental Biology*. 217: 3146-3158.

Brad J. Gemmell
Department of Integrative Biology
The University of South Florida
4202 E Fowler Ave, SCA110
Tampa, FL 33620

Phone: 813-974-1228
Email: bgemmell@usf.edu

PROFESSIONAL PREPARATION

B.Sc., Biology, University of Victoria, B.C. Canada. 2006
Ph.D., Marine Science, University of Texas at Austin, Austin, T.X. 2011
Postdoctoral researcher, University of Minnesota, Minneapolis, M.N. 2011
Postdoctoral researcher, Marine Biological Laboratory, Woods Hole, M.A. 2012-2013

APPOINTMENTS

2015-present, Assistant Professor, University of South Florida, Tampa, F.L.
2013-present, Adjunct Research Scientist, Marine Biological Laboratory, Woods Hole, M.A.
2013-2015, Research Associate, University of Texas at Austin, Port Aransas, T.X.
2006-2011, Graduate Research Assistant, University of Texas at Austin, Port Aransas, T.X.
2006-2007, Teaching Assistant, University of Texas at Austin, Austin, T.X.
2004-2005, Research Assistant, University of Victoria, B.C. Canada.
2001-2005, Marine Aquatic Biology Manager, University of Victoria, B.C. Canada.

PRODUCTS - FIVE MOST RELEVANT TO THIS PROPOSAL

Gemmell, B. J., Colin, S.P., Costello, J. H., Sutherland, K. 2019. A ctenophore (comb jelly) employs vortex rebound dynamics and outperforms other gelatinous swimmers. *Royal Society Open Science*. DOI: 10.1098/rsos.181615.

Sutherland, K., **Gemmell, B. J.**, Colin, S.P., Costello, J. H. 2019. Propulsive design principles in a multi-jet siphonophore. *Journal of Experimental Biology*. DOI: 10.1242/jeb.198242

Gemmell, B. J., Colin, S.P., Costello, J. H. 2017. Widespread utilization of passive energy recapture in swimming medusae. *Journal of Experimental Biology*. DOI: 10.1242/jeb.168575

Gemmell, B. J., Oh, G., Villareal, T. Buskey, E. J. 2016. Dynamic sinking behavior in marine phytoplankton: rapid changes in buoyancy may aid in nutrient uptake. *Proceedings of the Royal Society B*. doi: 10.1098/rspb.2016.1126

Gemmell, B. J., Jiang, H., Buskey, E. J. 2014. A new approach to micro-scale particle image velocimetry (μ PIV) for quantifying flows around free-swimming zooplankton. *J. Plankton Res.* 36 (5). doi:10.1093/plankt/fbu067

FIVE OTHER RELEVANT PRODUCTS

Jaspers, C., Costello, J. H., Sutherland, K., **Gemmell, B. J.**, Lucas, K. N., Colin, S. P. 2017. Resilience in moving water: Effects of turbulence on the predatory impact of the lobate ctenophore *Mnemiopsis leidyi*. *Limnology and Oceanography*. DOI: 10.1002/lno.10642

Gemmell, B. J., Adhikari, D., & Longmire, E. K. 2014. Volumetric quantification of fluid flow reveals fish's use of hydrodynamic stealth to capture evasive prey. *J. R. Soc. Interface*, 11(90), 20130880. doi: 10.1098/rsif.2013.0880

Gemmell, B. J., Costello, J. H., Colin, S. P., Stewart, C. J., Dabiri, J. O., Tafti, D., Priya, S. 2013. Passive energy recapture in jellyfish contributes to propulsive advantage over other metazoans. *Proc. Nat. Acad. Sci. USA*. doi:10.1073/pnas.1306983110

Gemmell, B. J., Sheng, J. and Buskey, E. J. 2013. Morphology of seahorse head hydrodynamically aids in capture of evasive prey. *Nature Comm.* 4 (2840). doi: 10.1038/ncomms3840.

Gemmell, B. J., Jiang, H., Strickler, R. and Buskey, E. 2012. Plankton Reach New Heights in Effort to

Avoid Predators. *Proc. R. Soc. B.* 279: 2786-2792.

SYNERGISTIC ACTIVITIES

1. Communicating science to the public:

Contributed to written/video publications in BBC News, NY Times, LA Times, Discovery Channel, National Geographic, Smithsonian, ABC News, Popular Mechanics and Nature News, regarding my published manuscripts.

Participation in multiple live-link K-12 classroom activities where scientists give interactive lessons remotely to classrooms around the country.

2. Science lectures:

“Squishy swimmers” Microscale Ocean Biophysics meeting. *Invited Plenary Speaker*. Whistler, Canada. January 2019.

“Jellies and eels and sharks oh my! Marine swimmers provide clues to designing efficient underwater vehicles” USF Trail Blazers Seminar Series. Tampa FL, November 2017.

“It’s a fluid situation: Strategies for swimming and feeding in aquatic ecosystems” University of Milwaukee. April 2016.

“Surviving on fast food: Investigating trophic interactions between fish and copepods” University of Oregon. January 2015.

“Capturing the ocean's greatest escape artist: techniques fish use to eat their favorite food” Port Aransas, TX. February 2014.

“The role of plankton in determining the fate of spilled oil in the ocean” Rockport, TX. January 2014.

“Quantifying aquatic predator-prey interactions” Harvard University, Cambridge, MA. July 2013.

“Animal propulsion: The role of energy recapture strategies” Tufts University, Boston, MA. April 2013.

“Learning from nature: understanding jellyfish locomotion to build underwater vehicles.” MBL 101 Lecture Series. Marine Biological Laboratory, Woods Hole MA. April 2012.

3. Service to science community:

Proposal reviewer for NSF and the National Estuarine Research Reserve (2011-present); Manuscript reviewer for *Journal of the Royal Society Interface*, *Journal of Experimental Biology*, *Journal of Plankton Research*, *Crustacean Biology*, *PLoS ONE*, *Marine Ecology Progress Series*, *ICES Journal of Marine Science* (2012-present).

4. Mentoring:

Currently mentoring:

Three graduate students: Olivia Blondhiem (PhD), Nils Tack (MS) and David Durieux (PhD)

Four undergraduates doing a directed studies project in my lab: Olivia Hawkins, Hailley Nieves, Edward Good and Sierra Paterno.

John Everett Parkinson, Ph.D.3475 SW 1st Ave., Apt. 16, Miami, FL 33145 | +1 (845) 258-0803 | thelifeaquatic.net | jeverettparkinson@gmail.com

EDUCATION:	•Ph.D., Department of Biology Pennsylvania State University Advisor: Iliana Baums, Ph.D.	July 2009 – August 2014 State College, PA
	•B.Sc., Marine Science and Biology, <i>Summa Cum Laude</i> Rosenstiel School of Marine and Atmospheric Science University of Miami	August 2005 – May 2009 Miami, FL
PROFESSIONAL EXPERIENCE:	•University of South Florida Assistant Professor	August 2019 – Present Tampa, FL
	•SCORE International Research Scientist: Bahamas Coral Restoration	November 2018 – June 2019 Miami, FL
POSTDOCTORAL TRAINING:	•Oregon State University, Department of Biology Advisor: Virginia Weis, Ph.D.	May 2016 – October 2018 Corvallis, OR
	•University of the Ryukyus, Department of Biology Advisor: James Reimer, Ph.D.	February 2015 – February 2016 Okinawa, Japan
	•Pennsylvania State University, Department of Biology Advisor: Iliana Baums, Ph.D.	August 2014 – January 2015 State College, PA
TEACHING EXPERIENCE:	<i>Graduate Courses</i>	
	•MCB 637: Molecular Host-Microbe Interactions (Oregon State University)	2018
	<i>Undergraduate Courses</i>	
	•BI 358: Symbiosis and the Environment (Oregon State University)	2017
	•BIOL 230W: Cell Biology Laboratory (Pennsylvania State University)	2012-2013
	<i>Undergraduate Guest Lectures</i>	
	•BIOL 482: Coastal Biology (Pennsylvania State University)	2011-2012
	•BIOL 417: Invertebrate Zoology (Pennsylvania State University)	2011
	<i>Workshops</i>	
	•Marine Symbiosis Data Analyses in R (University of the Ryukyus)	2018
MENTORING: <i>(unofficial capacity)</i>	•Kathryn Hampton Wonder (M.Sc. Oregon State University)	2016
	•Javid Kavousi (Ph.D. University of the Ryukyus)	2015
	•Victor Nestor (M.Sc. University of the Ryukyus)	2015
	•Hatsuko Noda (M.Sc. University of the Ryukyus)	2015
	•Shane Denecke (B.Sc. Pennsylvania State University)	2013
	•Nadia Abidi (B.Sc. Pennsylvania State University)	2010
	•Lucie Meier (Riverdale High School)	2017
•Thomas Cervone-Richards (Warwick Valley High School)	2012	

PEER-REVIEWED
PUBLICATIONS:* Corresponding
author^ Graduate
advisee# Undergraduate
advisee

h-index: 11

i10-index: 12

Total citations: 702

- 18) Baums IB*, Baker AC, Davies SW, Grottoli AG, Kenkel CD, Kitchen SA, Kuffner IB, LaJeunesse TC, Matz MV, Miller MW, **Parkinson JE**, Shantz AA (in press) Considerations for maximizing the adaptive potential of restored coral populations in the western Atlantic. *Ecological Applications*
- 17) Gabay Y, **Parkinson JE**, Wilkinson SP, Weis VM, Davy SK* (in press) Inter-partner specificity limits acquisition of thermotolerant symbionts in a model cnidarian-dinoflagellate symbiosis. *ISME Journal*
- 16) LaJeunesse TC*, **Parkinson JE***, Gabrielson PW, Jeong HJ, Reimer JD, Voolstra CR, Santos SR (2018). Systematic revision of Symbiodiniaceae highlights the antiquity and diversity of coral endosymbionts. *Current Biology* 28:2570-2580. doi: 10.1016/j.cub.2018.07.008
- 15) **Parkinson JE***, Tivey TR, Mandelare PE, Adressa DA, Loesgen S, Weis VM (2018) Subtle differences in symbiont cell surface glycan profiles do not explain species-specific colonization rates in a model cnidarian-algal symbiosis. *Frontiers in Microbiology* 9:842. doi: 10.3389/fmicb.2018.00842
- 14) **Parkinson JE***, Bartels E, Devlin-Durante MK, Lusic C, Nedimyer K, Schopmeyer S, Lirman D, LaJeunesse TC, Baums IB (2018) Extensive transcriptional variation poses a challenge to thermal stress biomarker development for endangered corals. *Molecular Ecology* 27:1103-1119. doi: 10.1111/mec.14517
- 13) Noda H#, **Parkinson JE**, Yang SY, Reimer JD* (2017) A preliminary survey of zoantharian endosymbionts shows high genetic variation over small geographic scales on Okinawa-jima Island, Japan. *PeerJ* 5:e3740. doi: 10.7717/peerj.3740
- 12) Gupstra CGB*, Coma R, Ribes M, Leydet KB, **Parkinson JE**, McDonald K, Catlla M, Voolstra CR, Hellberg ME, Coffroth MA (2017) Evidence for coral range expansion accompanied by reduced diversity of *Symbiodinium* genotypes. *Coral Reefs* 36:981-985. doi:10.1007/s00338-017-1589-2
- 11) Reimer JD*, Herera M, Gatins R, Roberts MB, **Parkinson JE**, Berumen ML (2017) Latitudinal variation in the symbiotic dinoflagellate *Symbiodinium* of the common reef zoantharian *Palythoa tuberculosa* on the Saudi Arabian coast of the Red Sea. *Journal of Biogeography* 44:661-673. doi:10.1111/jbi.12795
- 10) Kavousi J*^, **Parkinson JE**, Nakamura T (2016) Combined ocean acidification and low temperature stressors cause coral mortality. *Coral Reefs* 35:903-907. doi:10.1007/s00338-016-1459-3
- 09) **Parkinson JE***, Yang SY, Kawamura I, Byron G, Todd P, Reimer J (2016) A citizen science approach to monitoring bleaching in the zoantharian *Palythoa tuberculosa*. *PeerJ* 4:e1815. doi:10.7717/peerj.1815
- 08) **Parkinson JE***, Baumgarten S, Michell CT, Baums IB, LaJeunesse TC, Voolstra CR* (2016) Gene expression variation resolves species and individual strains among coral-associated dinoflagellates within the genus *Symbiodinium*. *Genome Biology and Evolution* 8:665-680. doi:10.1093/gbe/eww019
- 07) **Parkinson JE***, Banaszak AT, Altman NS, LaJeunesse TC, Baums IB (2015) Intraspecific diversity among partners drives functional variation in coral symbioses. *Scientific Reports* 5:15667. doi:10.1038/srep15667
- 06) **Parkinson JE***, Coffroth MA, LaJeunesse TC (2015) New species of Clade B *Symbiodinium* (Dinophyceae) from the greater Caribbean belong to different functional guilds: *S. aenigmaticum* sp. nov., *S. antillogorgium* sp. nov., *S. endomadracis* sp. nov., and *S. pseudominutum* sp. nov. *Journal of Phycology*. 51:850-858. doi:10.1111/jpy.12340
- 05) **Parkinson JE**, Baums IB* (2014) The extended phenotypes of marine symbioses: ecological and evolutionary consequences of intraspecific genetic diversity in coral-algal associations. *Frontiers in Microbiology* 5:445. doi:10.3389/fmicb.2014.00445
- 04) LaJeunesse TC*, Wham D, Pettay DT, **Parkinson JE**, Keshavmurthy S, Chen C (2014) Ecologically differentiated, thermally tolerant endosymbionts in the dinoflagellate genus *Symbiodinium* (Dinophyceae) are different species. *Phycologia* 53(4):305-319. doi:10.2216/13-186.1
- 03) Cooper WT*, Lirman D, Porter M, **Parkinson JE**, Herlan J, McManus JW (2014) Assessing techniques to improve early post-settlement survivorship of corals for in situ restoration. *Bulletin of Marine Science* 90:651-664. doi:10.5343/bms.2013.1020
- 02) Baums IB*, Devlin-Durante MK, Polato NR, Xu D, Giri S, Altman NS, Ruiz D, **Parkinson JE**, Boulay JN (2013) Genotypic variation influences reproductive success and thermal stress tolerance in the reef building coral *Acropora palmata*. *Coral Reefs* 32(3):703-717. doi:10.1007/s00338-013-2012-6
- 01) LaJeunesse TC*, **Parkinson JE**, Reimer JD (2012) A genetics-based description of *Symbiodinium minutum* sp. nov. and *S. psygmophilum* sp. nov. (Dinophyceae), two dinoflagellates symbiotic with Cnidaria. *Journal of Phycology* 48(6):1380-1391. doi:10.1111/j.1529-8817.2012.012

Biographical Sketch

SUSAN SCHLOEMER BELL Department of Integrative Biology sbell@usf.edu
University of South Florida
Tampa, FL 33620

Professional Preparation

Clark University, Worcester, Massachusetts Biology B.A. 1972
University of New Hampshire, Durham, New Hampshire Zoology M.S. 1974
University of South Carolina, Columbia, South Carolina Marine Science Ph.D. 1979

Appointments

2009-2011, Chair, Department of Integrative Biology
2006-2009 Co-Chair, Department of Biology, University of South Florida
2006-2009 Division Director, Integrative Biology, University of South Florida
1998-2000 Interim Chair, Department of Biology, University of South Florida
1992 -1993, Assistant Dean, College of Arts and Sciences, University of South Florida
1990- present, Professor, Department of Biology, University of South Florida.
1983-1990, Associate Professor, Department of Biology, University of South Florida.
1979-1983, Assistant Professor, Department of Biology, University of South Florida.
1979, Research Associate, Belle W. Baruch Institute for Marine Biology and Coastal Research, University of South Carolina

Selected Publications (n=125 total publications)

- Kiskaddon, E. and S.S. Bell. 2019. Investigating anthropogenic impacts on mangrove food webs via trophic analyses of the omnivore, *Armases cinereum*, in Tampa Bay, FL PLoS ONE 14(2): e0212448.
<https://doi.org/10.1371/journal.pone.0212448>
- Peterson, J.M. and S.S. Bell. 2018. Species composition of patches influences mangrove recruitment in a salt marsh mosaic. Marine Ecology Progress Series 602:103-116.
- Bell, S.S., M.O. Hall and Middlebrooks, M.L. 2014. The value of long-term assessment of restoration: support from a seagrass investigation. Restoration Ecology 22:304-310.
- Pu, R., S.S. Bell and C. Meyer. 2014. Mapping and Assessing Seagrass Bed Changes along Central Florida's West Coast Using Multitemporal Landsat TM Imagery. Estuarine and Coastal Shelf Science 149:68-79.
- Bell, S.S., A. Tewfik, M.O. Hall and M.S. Fonseca. 2008. Evaluation of seagrass planting and monitoring techniques: Implications for assessing recovery times and habitat equivalency analysis. Restoration Ecology 16: 407-416.
- Fonseca, M.S., W.J. Kenworthy, E. Griffith, M.O. Hall, M. Finkbeiner and S.S. Bell. 2008. Contrasting influence of disturbance and life history on landscape pattern of an oceanic seagrass (*Halophila decipiens*). Estuarine and Coastal Shelf Science 76: 163-174.
- Bell, S.S., M.S. Fonseca and W.J. Kenworthy. 2007. Dynamics of a subtropical seagrass landscape: links between disturbance and mobile seed banks.

Landscape Ecology 23 (S1): Pages: 67-74

Bell, S.S. 2006. Seagrasses and the metapopulation concept. **IN** Marine metapopulations (J. Kritzer and P. Sale, eds). Academic Press p. 387-404

Bell, S.S., M.S. Fonseca and N. Stafford. 2005. Seagrass ecology: new contributions from a landscape perspective. **IN** Seagrass Biology: A Treatise (T. Larkum, R. Orth and C. Duarte, eds). Kluwer p.625-645.

Robbins, B.D. and S.S. Bell. 2000. Dynamics of a subtidal seagrass landscape: seasonal and annual change in relation to water depth. *Ecology* 81:1193-1205.

Bell, S.S., B.D. Robbins and S. L. Jensen. 1999. Gap dynamics in a seagrass landscape. *Ecosystems* 2:493-504.

Synergistic Activities

Bartsch, I., E. Snow and S.S. Bell. 1998. FLEDGE-ling: A Science Program for Girls. *J. Women Minorit. Sci. Engineer.* 4:321-331. Selected Professional Activities 2002-present: Mentor for R. Pride Minority Fellow, University of South Florida; Reviewer, Pre-doctoral Awards, Association for Women in Science Educational Foundation; Heinz Center, Landscape Ecology Working Group; Chair, Coastal Ecology Working Group; Mentor for McNair Minority Fellowship program; Reviewer, Women's International Science Collaboration Program, AIBS, Washington; Technical Advisory Committee, Rookery Bay National Estuarine Research Reserve; Heinz Center, Landscape Ecology Working Group; Advisory Board, Florida Institute of Oceanography; Editorial board: *Journal of Experimental Marine Biology and Ecology*; *Restoration Ecology*; Group Leader-Institute for Academic Leadership (3 years); Tampa Bay Ecological Services Steering Committee. NAS /NRC working group on Coastal Risk; NAS-NRC Committee on Coastal Risk 2013-2014; Member of Seagrass Restoration Review Committee for the Chesapeake Bay Scientific and Technical Advisory Committee (STAC); Recent relevant funding: NASA, NRA/Research Opportunities in Space and Earth Sciences, Mapping and Characterization of Seagrass Habitats Using Spacecraft Observations", \$359,537 (PI); Total number of grants: 44.

Recent Awards

AAAS Fellow; USF Outstanding Faculty Award; Distinguished University Professor; William Niering Award- Outstanding Educator, Coastal and Estuarine Research Federation

Graduate Students 2000-2019: Brad Robbins, Susan Jensen, Kevin Madley, R. Allen Brooks, Sheri Saiter, L. Ben Motten, Amy Erickson, William Ellis, Samuel Jacobson, Noel Rizzuto; Carla Purdy, Justin Bowles, Jennifer Gibson, Laura Bedinger, Justin Krebs, Michael Middlebrooks, Alison Meyers, Jennifer Peterson, Kris Kaufmann. Kristina Morrow, Elizabeth Salewski, Stephen Hesterberg, Erin Kiskaddon, Shannon Grogran, Derrick Hudson, Christopher Duckett, Dinorah Chacin, Kourtney Barber. Total number of major professorships for graduate students: 45.

Postdoctoral Associates

Roberto Llanso, Lee Ann J. Clements, Frederic E. Vose, William L. Ellis, Alex Tewfik, Louise Firth, Lore Ayoub, Lesley Baggett, Michael Middlebrooks, Ryan Rezek.

CURRICULUM VITAE

Melanie Ann Riedinger-Whitmore, Ph.D.

E-mail: mariedin@usfsp.edu

Education

Ph.D. Zoology	The Ohio State University	1993
M.S. Zoology	The Ohio State University	1986
B.S. Biological Sciences	Northern Kentucky University	1983

Recent Employment History

Full Professor (tenured), Department of Biological Sciences, University of South Florida St. Petersburg, 2019-present.

Associate Professor (tenured), Department of Biological Sciences, University of South Florida St. Petersburg, 2011- 2019.

Associate Professor (tenured), Environmental Science, Policy, and Geography, University of South Florida-St. Petersburg, 2005 – 2011.

Assistant Professor, Environmental Science, Policy and Geography, University of South Florida - St. Petersburg, 2003 - 2005.

Associate Professor (tenured), Department of Biology, Northeastern Illinois University (NEIU), 1999 - 2003.

Recent Administrative Experience (since 2009)

Chairperson, Department of Biological Sciences, USF St. Petersburg, 2011 – present.

(Founding chairperson of department with oversight for Biology, Health Science, and Math undergraduate programs, and Conservation Biology M.S. program)

Interim graduate program coordinator, Conservation Biology M.S., Fall 2017-2018.

Chairperson, Environmental Science, Policy, and Geography, USF-St. Petersburg, January 2009 – 2011.

Recent Publications

Whitmore, T.J., M.A. Riedinger-Whitmore, F.M. Lauterman, J.H. Curtis. 2018. Cyanobacterial influence on diatom community lifeform dynamics in shallow subtropical lakes of Florida USA. *J Paleolimnol* (online first, February). <https://doi.org/10.1007/s10933-018-0018-z>

Thompson, D.M., J.L. Conroy, A. Collins, S.R. Hlohowskyj, J.T. Overpeck, M. Riedinger-Whitmore, J.E. Cole, M.B. Bush, H. Whitney, T.L. Corley, and M.Steinitz-Kannan. 2017. Tropical Pacific climate variability over the last 6000 years as recorded in Bainbridge Crater Lake, Galápagos. *Paleoceanography and Paleoclimatology* 32(8):903-922. <https://doi.org/10.1002/2017PA003089>

Riedinger-Whitmore, M.A. 2016. Using palaeoecological and palaeoenvironmental records to guide restoration, conservation and adaptive management of Ramsar freshwater wetlands: lessons from the Everglades, USA. *Marine and Freshwater Research* 67(6) 707-720. <http://dx.doi.org/10.1071/MF14319>

Whitmore, T.J., F.M. Lauterman, K.E. Smith, and M.A. Riedinger-Whitmore. 2015. Limnetic total phosphorus transfer functions for lake management: considerations about their design, use, and effectiveness. *Front. Ecol. Evol.*, <http://dx.doi.org/10.3389/fevo.2015.00107>

Recent Grant/Contract funding

- Whitmore, T.J. and M.A. Riedinger-Whitmore. Paleolimnological Study to Infer Natural Background Water Quality of Four Lakes in the Kissimmee River Basin. Florida Department of Environmental Protection contract to the University of South Florida. \$124,987. May 15, 2017-December 30, 2019.
- Whitmore, T.J. and M.A. Riedinger-Whitmore. Paleolimnological study of Lakes Tohopekaliga, East Tohopekaliga, Kissimmee, and Cypress, Osceola County, Florida. Osceola County contract to the University of South Florida. \$149,542. Sept. 30, 2016-Sept. 30, 2019.
- Whitmore, T.J. and M.A. Riedinger-Whitmore. Paleolimnological Study of Lake Bonny, Lakeland, Florida. City of Lakeland, Florida. \$37,585. November, 2015-November, 2016.

Recent Presentations

- Riedinger-Whitmore, M., T. Whitmore, D. Franklin, F. Lauterman, and D.L. Howard. Innovative approaches in paleolimnology: how recent advances can inform lake management. 38th International Symposium of the North American Lake Management Society, Cincinnati, Ohio. Oct 30-November 2, 2018.
- Whitmore, T. J., M. A. Riedinger-Whitmore, F. M. Lauterman, N. Rose, H. D. Yang, J. H. Curtis, C. Leonard, D. Franklin, Z. L. Rivera-Reed, D. E. Evans, K. Alvarado. 2018. Paleolimnological assessment of Lakes on the Kissimmee Chain, South Florida USA. Oral presentation at the North American Lake Management Society Symposium, October 30-November 2, 2018, Cincinnati, Ohio, USA.
- Riedinger-Whitmore, M.A. 2017. Managing Shallow Florida Lakes Under a Warming and More Variable Climate. 37th International Symposium of the North American Lake Management Society, Westminster, Colorado, November 6-9.
- Whitmore, T.J., Z. Leyton Rivera-Reed, F. M. Lauterman, D. Franklin, and M. A. Riedinger-Whitmore. 2017. Assessing Past Influences of Associated Wetlands on Water Quality in Shallow Florida Lakes, With Implications for Management. 37th International Symposium of the North American Lake Management Society, Westminster, Colorado, November 6-9.
- Lauterman, F.M., T. J. Whitmore, M.A. Riedinger-Whitmore, K. Jackson, Z. Leyton Rivera-Reed, D. Franklin, H. Yang, and J. H. Curtis. 2017. Paleolimnological Reconstruction of Lake Bonny, Florida, USA: Wetland Destruction and Nutrient Loading as Important Drivers of Change. 37th International Symposium of the North American Lake Management Society, Westminster, Colorado, November 6-9.

Professional Memberships and Service

- Journal of Paleolimnology, Managing Editor, 2013 - present
International Paleolimnological Association
Botanical Society of America

Heather L. Judkins

(813) 340-0055c; Judkins@mail.usf.edu

Professional Preparation

University of South Florida	Biological Oceanography	Ph.D., 2009
Nova Southeastern University	Secondary Science Education	M.S., 1997
University of Rhode Island	Marine Affairs	B.S., 1993

Appointments

- 2019- Associate Professor, Biological Sciences, University of South Florida St. Petersburg, FL.
- 2009- Teacher Programs Coordinator, The Florida Aquarium, Tampa, FL
- 2013- 2019 Assistant Professor, Biological Sciences, University of South Florida St. Petersburg, FL.
- 2011-2013 Visiting Assistant Professor, Biological Sciences, University of South Florida St. Petersburg
- 1997-2010 Adjunct Instructor, Biological Sciences, St. Petersburg College, Clearwater, FL
- 1994-2011 Marine Science Instructor, Biology Department, Seminole High School, Pinellas County, FL

Grant Awards

NOAA RESTORE Act Award		\$2.7M
Co-PI on long-term deep sea monitoring of the northern Gulf of Mexico examining trends and drivers of the ecosystem from 0-1500m		
USFSP Internal Grant, 2018		\$9900.00
Awarded to explore the cryptic cephalopod species of the Gulf of Mexico through molecular Genetic markers.		
Gulf of Mexico Research Initiative Award- DEEPEND Consortium; 2018		\$1M
Co-PI on DEEPEND consortium which received a 1 year extension for additional cruise and analysis. Responsible for all mollusk related projects (n=7). ~30K to USFSP.		
NOAA Ocean Exploration Grant Award; 2018-2019		\$565,000
CO-PI on deep-sea exploration project in the Gulf of Mexico. Examining cephalopod biology, diversity, and bioluminescence properties at 2000m deep in the Sigsbee escarpment. Majority of funding is for shiptime. Responsible for 17K at USFSP for invertebrate and cephalopod related projects.		
USFSP Internal Grant, 2016		\$9900.00
Awarded to explore the genetic variation among 3 different cephalopod species in the Gulf of Mexico and over Bear Seamount in the northern Atlantic Ocean.		
Gulf of Mexico Research Initiative Award- DEEPEND Consortium (GoMRI); 2015-2017		\$8.53 M
Co-principal investigator of a 3-year study through the Deep-Pelagic Nekton Dynamics of the Gulf of Mexico (DEEPEND) consortium. The goal is to evaluate the extant recovery and potential future recovery of deep-pelagic communities after the DWHOS both short and long term scales through sampling and analysis. Responsible for \$430K at USFSP for cephalopod related projects.		

Research Experience

- DEEPEND Consortium- Deep Pelagic Nekton Dynamics of the Gulf of Mexico Program; 2015-present
Co-Principal investigator responsible for: cephalopod abundance, distribution, and biodiversity; genetic, species, and population genetics for the group; examining samples for trophic level dynamics as well as potential contaminants to the deep sea cephalopods. Also responsible for pelagic mollusk projects.
- National Resource Damage Assessment (NOAA/NRDA) Offshore Sampling and Analysis Program; 2011-2016
ONSAP program team member examining cephalopods from 7 cruises that were conducted in 2011.
Identification and verification of cephalopods in the northern Gulf of Mexico.
Documenting and analyzing all aspects of cephalopod ecology, vertical migration, new species records.

Recent Publications

Staudinger, M., V. Dimkovikj, C.A.M. France, E. Jorgensen, **H. Judkins**, A. Lindgren, E.K. Shea, M. Vecchione. Accepted; 2019. Trophic ecology of the deep-sea cephalopod assemblage near Bear Seamount in the Northwest Atlantic Ocean. Marine Ecology Progress Series.

Judkins, H., A. Lindgren, R. Villeneuve, K. Clark, M. Vecchione. Accepted. 2019. New Bathyteuthid species in the northern Gulf of Mexico; Bulletin of Marine Science.

R. Rosa, V. Pissarra, F. Borges, J. Xavier, I. Gleadall, A. Golikov, G. Bello, L. Martins, F. Lishchenko, Á. Roura, **H. Judkins**, C. Ibanez, U. Piatkowski, M. Vecchione, R. Villanueva. 2019. Global patterns of species richness in coastal cephalopods; Front. Mar. Sci., 02 August 2019; <https://doi.org/10.3389/fmars.2019.00469>.

A. Golikov, F. Ceia, R.M. Sabirov, J. Ablett, I. Gleadall, G. Gudmundsson, H. Hoving, **H. Judkins**, J. Pálsson, A.L. Reid, R. Rosas-Luis, E.K. Shea, R. Schwarz, J. Xavier. In Review. The deep-water Vampire Squid occupy a similar trophic level throughout its global range; Nature Communications.

Timm, L & **H. Judkins**, H. Bracken-Grissom, A. Sosnowski, M. Breitbart, M. Vecchione. In review 2019. Population connectivity of three deep-sea cephalopod species between the Gulf of Mexico and northwestern Atlantic Ocean; Deep Sea Research I.

Meath, B., E. Peebles, B. Seibel, **H. Judkins**. 2019. Stable Isotopes in the Eye Lenses of *Doryteuthis plei* (Blainville 1823): Exploring Natal Origins and Migratory Patterns in the Eastern Gulf of Mexico; Continental Shelf Research. 174:76-84; DOI: <https://doi.org/10.1016/j.csr.2018.12.013>

Sutton, T, T. Frank, **H. Judkins**, I. Romero. 2018. As Gulf oil extraction goes deeper, who is at risk? Community structure, distribution, and connectivity of the deep-pelagic fauna. *Scenarios and Responses to Deep-Oil Spills-Fighting the Next War. Vol. 2*. Springer Science.

Allcock, L., **H. Judkins**, Y. Sakuri. 2017. Editorial: Recent advances in cephalopod science. CIAC 2015 special issue. 2565-2567. <http://dx.doi.org/10.1080/00222933.2017.1389385>

Shea, E., **H. Judkins**, M.D. Staudinger, V. Hartigan, A. Lindgren, M. Vecchione. 2017. Cephalopod biodiversity in the vicinity of Bear Seamount, western North Atlantic. Marine Biodiversity; 47: 699. <https://doi.org/10.1007/s12526-017-0633-3>

Judkins H., M. Vecchione, A. Cook, T. Sutton. 2016. Diversity of midwater cephalopods in the northern Gulf of Mexico: comparison of two collecting methods. Marine Biodiversity. DOI 10.1007/s12526-016-0597-8

Judkins, H., K. Rosario, M. Vecchione. 2016. Morphological and molecular evidence of *Heteroteuthis dagamensis* in the Gulf of Mexico. Bulletin of Marine Science. DOI: <http://dx.doi.org/10.5343/bms.2015.1061>

Roper, C.F.E., **H. Judkins**, N. Voss, E. Shea, E. Dawes, D. Ingrao, P. Rothman, I. Roper. 2015. A compilation of recent records of the giant squid, *Architeuthis dux* (Steenstrup, 1857) (Cephalopoda) from the Western North Atlantic Ocean, Newfoundland to the Gulf of Mexico. American Malacological Bulletin, 33(1)1-11.

Hoving, HJ, J. Perez, K. Bolstad, H. Braid, A. Evans, D. Fuchs, **H. Judkins**, J. Kelly, J. Marian, R. Nakajima, U. Piatkowski, A. Reid, M. Vecchione, J. Xavier. 2014. The Study of Deep-Sea Cephalopods; E. Vidal editor; Advances in Marine Biology, v.67; 235-259.

Judkins, H., S. Arbuckle, M. Vecchione, L. Garrison, A. Martinez. 2013. Cephalopods in the potential prey field of Sperm Whales (*Physeter macrocephalus*) in the northern Gulf of Mexico. Journal of Natural History, DOI: 10.1080/00222933.2013.802045

Recent Research Presentations

2019: - Diel vertical migration facilitates connectivity between mesopelagic prey and epipelagic predatory fishes.

Murawski, S., T. Sutton, E. Pulster, E. Hughes, J. Morris, K. Boswell, M. Schwaab, I. Romero, **H. Judkins**. Oral presentation. Gulf of Mexico Oil Spill and Ecosystem Science Conference Feb. 2019.

2018: - **What have we learned since 2011 about cephalopods in the northern Gulf of Mexico?** **H. Judkins**, M. Vecchione, A. Sosnowski, I. Romero, T. Richards, L. Timm, A. Cook, T. Sutton. Oral Presentation. CIAC

International Conference, St. Petersburg, FL, Nov. 2018.

-DEEPEND: What have we learned since 2011 about cephalopods in the northern Gulf of Mexico?; **H. Judkins**, M. Vecchione, A. Sosnowski, I. Romero, T. Richards, L. Timm, A. Cook, T. Sutton. Oral Presentation. Gulf of Mexico Oil Spill and Ecosystem Science Conference, Feb. 2018.

-DEEPEND: Species abundance, spatial and vertical distributions of Heteropods (Pterotracheoidea) in the northern Gulf of Mexico. K. Clark*, B. Seibel, M. Vecchione, **H. Judkins**; oral presentation. Gulf of Mexico Oil spill and Ecosystem Science conference; Feb. 2018.

2017: - DEEPEND: Preliminary Results of Cephalopod Vertical Migration Patterns in the Northern Gulf of Mexico; **H. Judkins**, M. Vecchione, A. Cook, T. Sutton. Poster Gulf of Mexico Oil Spill and Ecosystem Science conference. Feb. 2017.

-DEEPEND: Preliminary Results of Cephalopod Vertical Migration Patterns in the Northern Gulf of Mexico; **H. Judkins**, M. Vecchione, A. Cook, T. Sutton. Oral presentation. Aquatic Sciences and Limnology conference. Feb.-Mar. 2017

-DEEPEND: New Bathyteuthid species in the northern Gulf of Mexico. **H. Judkins**, A. Lindgren, K. Clark, M. Vecchione; Oral presentation. American Malacological Society Conference, July, 2017.

2016: -Vertical Distribution Patterns of the Cephalopod Fauna of the Gulf of Mexico; **H. Judkins**, A. Cook, T. Sutton, M. Vecchione. 2016 Gulf of Mexico Oil Spill and Ecosystem Science Conference. Poster.

-The Dynamics of Vertical Movement in the Oceanic Gulf of Mexico after the Deepwater Horizon: Active Linkage of Large Vertebrates and Deep Pelagic Realm. T. Sutton*, A. Cook, T. Frank, K. Boswell, M. Vecchione, **H. Judkins**, I. Romero. 2016 Gulf of Mexico Oil Spill and Ecosystem Science Conference. Poster.

-The Dynamics of Vertical Movement in the Oceanic Gulf of Mexico after the Deepwater Horizon: Active Linkage of Large Vertebrates and Deep Pelagic Realm. T. Sutton*, A. Cook, T. Frank, K. Boswell, M. Vecchione, **H. Judkins**, I. Romero. 2016 Ocean Sciences Meeting. Poster.

Leadership Experience

- DEEPEND Consortium Outreach/Education team leader for the 4-year program.
- Florida Institute of Oceanography USFSP representative, Education and Bylaws committees
- Event Organizer for 2018 International Cephalopod Advisory Council Symposium- USFSP
- AdvisOr to undergraduate biology student capstone research projects; 38 to date; includes Honors theses.
- Chief Scientist onboard USF research vessels for undergraduate field research experiences; 2012- present
- Successfully led two study- abroad biology summer experiences
- 2012- Biogeography of the Panama Gap: 6 week undergraduate course with 3 weeks in the rainforest and volcanic ecosystems of Costa Rica and the marine ecosystem in Panama; 12 students.
- 2014- Field Studies in Biology: 4 week undergraduate course with 2 weeks in the rainforest and marine ecosystems of Puerto Rico; 12 students.
- Regional coordinator for the NOSB Spoonbill Bowl; 2004-2009.

Noel Yoko Takeuchi

(727) 873-4303 | ntakeuchi@mail.usf.edu

EDUCATION

2007 – 2012	University of Florida PhD Veterinary Medical Sciences College of Veterinary Medicine, Department of Physiological Sciences Center for Environmental and Human Toxicology	Gainesville, FL
2005 – 2007	University of New England MS Marine Science College of Arts and Sciences, Department of Marine Sciences	Biddeford, ME
1998 - 2002	University of California, Davis BS Animal Science Specializing in companion and captive animal management; Minor in Japanese	Davis, CA

TEACHING AND RELEVANT WORK EXPERIENCE

2018 – Present	Instructor I University of South Florida St. Petersburg, Department of Biological Sciences, FL, USA <ul style="list-style-type: none"> ▪ Human Anatomy and Physiology I and II, Lecture and Laboratory (BSC 2093C, BSC 2094C) for majors ▪ Cellular Processes - Biology I (BSC 2010) for majors ▪ General Physiology (PCB 3712) for majors 	
2015 – 2018	Visiting Assistant Professor University of South Florida St. Petersburg, Department of Biological Sciences, FL, USA <ul style="list-style-type: none"> ▪ Human Anatomy and Physiology I and II, Lecture and Laboratory (BSC 2093C, BSC 2094C) for majors ▪ Cellular Processes - Biology I (BSC 2010) for majors ▪ General Physiology (PCB 3712) for majors ▪ Wild Vertebrates of Florida (BSC 4933) for majors 	
2014 – 2015	Adjunct Faculty University of South Florida St. Petersburg, Department of Biological Sciences, FL, USA <ul style="list-style-type: none"> ▪ Human Anatomy and Physiology I and II Laboratory (BSC 2093C, BSC 2094C) for majors 	
2013 - 2015	Adjunct Faculty University of Tampa, Department of Biology, FL, USA <ul style="list-style-type: none"> ▪ Biology (BIO 124) for non-majors ▪ Environmental Science (BIO 112) for non-majors 	
2010 - 2011	Laboratory Instructor University of Florida, Department of Animal Sciences, FL, USA <ul style="list-style-type: none"> ▪ Reproductive Physiology (ANS 3319) for majors 	
2005 - 2007	Laboratory Instructor University of New England, Department of Biology, ME, USA <ul style="list-style-type: none"> ▪ Introductory Biology for majors (BIO 101) and non-majors (BIO 104) 	
2003 - 2006	Veterinary Technician Harbor Animal Hospital, CA, USA <ul style="list-style-type: none"> ▪ Assisted veterinarians with surgeries, examinations, and general medical care of companion animals, pocket pets, reptiles, and avian species ▪ Responsible for client education on appropriate care and prescription administration 	

RELEVANT RESEARCH EXPERIENCE AND AWARDED RESEARCH SUPPORT

2013 – Present	Biological Scientist (formerly Research Associate, Research Assistant) Florida Fish and Wildlife Conservation Commission, Fish and Wildlife Research Institute, Harmful Algal Bloom Group, FL, USA
2013	Biological Scientist Florida Fish and Wildlife Conservation Commission, Fish and Wildlife Research Institute, Marine Mammal Pathobiology Laboratory, FL, USA
2012	Endeavour Postdoctoral Research Award, Australian Government Department of

- Education, Employment and Workplace Relations, University of Queensland, National Research Centre for Environmental Toxicology, Queensland, Australia
Mentor: Caroline Gaus, PhD, *Trace metal control in Paenungulata*
- 2010 Lerner Gray Grant for Marine Research, American Museum of Natural History
2009 East Asia and Pacific Summer Institutes Program, National Science Foundation and the Australian Academy of Sciences, University of Queensland, National Research Centre for Environmental Toxicology, Queensland, Australia
Mentor: Susan Bengston Nash, PhD, *Persistent organic pollutants in Humpback whales*
- 2008 College of Veterinary Medicine Team Building Grant
University of Florida, College of Veterinary Medicine, FL, USA
Advisor: David Barber, PhD, *Trace metal concentrations and the physiological role of zinc in the West Indian manatee (*Trichechus manatus*)*
- 2007 Board of Education Fellowship, Office of Graduate Minority Programs, University of Florida
2005 Norcross Wildlife Foundation, The A.V. Stout Fund
University of New England, Department of Biological Sciences, ME, USA
Advisor: Kathryn Ono, PhD, *Dietary analysis of artificial harbor seal (*Phoca vitulina*) formulas with a focus on circulating retinol and α -tocopherol levels*

PUBLICATIONS

- In Prep Takeuchi, N.*, O'Shea, T., Bonde, R., deWit, M., Beck, C., Barber, D. Trace metals in tissues of free-ranging Florida manatees (*Trichechus manatus latirostris*) and its environment: Thirty year perspective of trace metals in the Florida manatee.
- 2018 O'Shea, T.J., Takeuchi, N.Y.*, Weijs, L., and Marsh, H. "Ecotoxicology of the Sirenia in the Twenty-First Century" In: *Marine Mammal Ecotoxicology*. Eds. C. Panti and C. Fossi. London: Academic Press, pp. 429-456.
- 2016 Takeuchi, N.Y.*, Walsh, M.T., Bonde, R.K., Powell, J.A., Bass, D.A., Gaspard, J.C., Barber, D.S. Baseline reference range for trace metal concentrations in whole blood of wild and managed West Indian manatees (*Trichechus manatus*) in Florida and Belize. *Aquatic Mammals*.
- 2011 Takeuchi, N.Y.*, Ono, K.A., Barber, D.S. Circulating retinol and α -tocopherol levels in rescued harbor seal (*Phoca vitulina*) pups consuming artificial formula. *Journal of Wildlife Rehabilitation* 31(3): 15-22.
- 2011 Wiedner, E.B., Takeuchi, N.Y.*, Isaza, R., Barber, D.S. Baseline levels of trace metals in blood of captive Asian elephants (*Elephas maximus*). *Journal of Zoo and Wildlife Medicine* 42(2): 360-362.

Sean Doody

Assistant Professor, Department of Biological Sciences,
Phone: (706) 982-9729
Email: jseandoody@gmail.com
Web: www.projectkimberley.org

Google scholar: Citations = 2410; h-index = 25; i10-index = 46; 130 peer-reviewed publications

EDUCATION

- 2002 PhD Applied Science, University of Canberra, Canberra, Australia. Thesis: *Ecology of Sex Determination in the Pig-nosed Turtle, Carettochelys insculpta*
- 1995 MSc Biological Sciences, Southeastern Louisiana University, Hammond, Louisiana, USA (Phi Kappa Phi Honor Society: Top 5% of class). Thesis: *Comparative Nesting Ecology of Two Syntopic Species of Softshell Turtles in Southeastern Louisiana*
- 1992 BSc Zoology, Louisiana State University, Baton Rouge, Louisiana, USA

WORK HISTORY

- 2018- **Assistant Professor** University of South Florida – St. Petersburg, FL, USA
- 2017- **Visiting Assistant Professor** University of South Florida – St. Petersburg, FL, USA
- 2018
- 2015- **Instructor** Southeastern Louisiana University, Hammond, LA, USA
- 2017
- Courses being taught: *Ecology, Field Ecology Laboratory, Conservation Biology, General Biology II, Anatomy & Physiology II Laboratory*

RESEARCH GRANTS (only those above \$15,000 included)

- 2018 'Spatial Ecology of an Iconic Australian species, the Perentie' Jane Fenwick Foundation, **\$15,000**
- 2015 'Building the Kimberley ark: measuring and preserving genetic diversity of native predators prior to impact by cane toads.' Jane Fenwick Foundation, **\$45,000**
- 2014 'The impact of off-road vehicle traffic on turtle nests and populations in the Comite River, Louisiana: A scenic rivers area.' Louisiana State Wildlife Grant, **\$77,000**
- 2013 'Spatial ecology of the yellow-spotted monitor prior to the cane toad invasion'. Jane Fenwick Foundation, **\$50,000**
- 2013 'Building the Kimberley ark: measuring genetic diversity of native predators prior to impact by cane toads.' Taronga Zoo Field Conservation Grant, **\$17,000**
- 2013 'Kimberley Ark Project'. Stop the Toad Foundation, **\$80,000**
- 2012 'Impact of Invasive Cane Toads on Native Wildlife.' Jane Fenwick Foundation, **\$30,000**
- 2011 'Impact of Invasive Cane Toads on Native Wildlife.' Australian Geographic, **\$30,000**
- 2009 'Impact of Invasive Cane Toads on Native Fauna', Department of Environment and Heritage, Australian Government, Caring for Our Country Scheme, **\$143,000**
- 2009 'Ecology and Conservation of the Madagascar Spider Tortoise'. Wildlife Conservation Society, **\$25,000**
- 2009 'Ecology and Conservation of the Madagascar Spider Tortoise'. American Association of Zoos and Aquariums, **\$20,000**
- 2006 'Reconciling Wildlife Conservation and Rice Farming in the Riverina'. Rural Industries Research and Development Corporation and Ricegrowers' Association, **\$342,000**
- 2006 'Research and Monitoring of Wildlife on Wagiman Aboriginal Lands'. Natural Heritage Trust,

Australian Government, Pine Creek Aboriginal Advancement Association, and University of Canberra Strategic Industry Linkage Grant 2006, **\$50,000**

2005 'Impacts of Invasive Cane Toads on Native Predators'. Natural Heritage Trust, Australian Government and Commonwealth Scientific & Industrial Research Organization, **\$31,000**

RECENT TEACHING EXPERIENCE

- 2017- PRESENT - **Coordinator:** *Biology I Lab*; **Instructor:** *Conservation Biology, Invasive Biology, Environmental Issues, Biology II, Conservation Biology Theory.* USFSP
- 2017 **Coordinator:** *Conservation Biology, Ecology, Field Ecology Lab*; **Instructor:** *General Biology II, Seminar in Biology.* Southeastern Louisiana University
- 2016 **Coordinator:** *Conservation Biology, Ecology, Field Ecology Lab*; **Instructor:** *General Biology II.* Southeastern Louisiana University
- 2015 **Coordinator:** *Ecology, Field Ecology Lab*; **Instructor:** *General Biology II, Human Anatomy & Physiology II Lab.* Southeastern Louisiana University

RECENT PUBLICATIONS

- Doody, J. S.**, Dinets, V., and Burghardt, G. B. 2020. Secret Societies: The Social Life of Reptiles. *Johns Hopkins University Press (In press)*.
- Doody, J. S.**, McHenry, C. M., Rhind, D., Hands, K., Bass, M., Sawyer, G., Gray, C., Stokeld, D., and Clulow, S. Population-level impact of invasive cane toads on quolls: A landscape-scale experiment. *Biological Invasions (under review)*.
- Murray, C. M., Crother, B., and **Doody, J. S.** The evolution of crocodylian reproduction and behavior. *Evolution and Ecology (under review)*.
- Doody, J. S.** and N. Pezaro. Mothers know best: nest site choice and its role in the expression of developmental plasticity in reptiles. *Journal of Experimental Zoology* (invited to special issue on developmental plasticity, *under review*)
- Pezaro, N., **Doody, J. S.**, and Thompson, M. B. The quick and the fed: embryonic resource allocation as an adaptive strategy in an oviparous lizard. *Functional Ecology (under review)*.
- Doody, J. S.**, Rhind, D., and Clulow, S. Paradoxical population persistence of a keystone predator to a toxic invasive species. *Wildlife Research (under review)*.
- Paull, P. and **Doody, J. S.** Follow the breeder: Conspecific attraction explains communal nesting in a lizard. *Oecologia (under review)*
- Campbell, L., Upton, R., **Doody, J. S.**, Nixon, B., Clulow, J. and Clulow, S. A model protocol for the cryopreservation and recovery of motile lizard sperm using the phosphodiesterase inhibitor caffeine. *Reproduction (accepted pending revision)*
- Parrott, M., **Doody, J. S.**, McHenry, C. M., and Clulow, S. 2019. Eat your heart out: choice and handling of novel toxic prey by predatory water rats. *Australian Mammalogy* (doi.org/10.1071/AM19016)
- Doody, J. S.**, McHenry, C., Rhind, D., and Clulow, S. 2019. Novel habitat causes a shift to diurnal activity in a nocturnal species. *Scientific Reports* 9:230-235.
- Doody, J. S.**, McHenry, C., Letnic, M., Everitt, C., Sawyer, G., and Clulow, S. 2019. Forecasting the spatiotemporal pattern of invasion of the cane toad invasion into northwestern Australia. *Wildlife Research* 45:718-725.
- Doody, J. S.** 2019. Book Review: Status of Conservation and Decline of Amphibians. Australia, New Zealand, and Pacific Islands. *Herpetological Review* 50:411-414.
- Doody, J. S.**, McHenry, C. M., Durkin, L., Brown, M., Simms, A., Coleman, L., Phizacklea, C., Jones, H., Phizacklea, O., and Clulow, S. 2018. Deep, helical nesting in the yellow-spotted monitor in a Desert ecosystem: Indirect evidence for a response to extreme dry conditions. *Herpetologica* 74:306-310.

D'Amore, D., Clulow, S., **Doody, J. S.**, Rhind, D., and McHenry, C. R. 2018. Claw morphometrics in monitor lizards: functional morphology and niche separation within a top predator guild. *Evolution & Ecology* 8:6766-6778.

Doody, J. S., McHenry, C., Brown, M., Canning, G., Vas, G., and Clulow, S. 2018. Deep, helical communal nesting in the sand monitor: Ecology informing paleoecology? *Journal of Zoology (London)* 305:88-95.

D'Amore, D., Meadows, D., Clulow, S., **Doody, J. S.**, Rhind, D. and McHenry, C. R. 2018. Increasing dietary breadth through allometry: bite forces in sympatric Australian skinks. *Herpetology Notes* 11:179-187.

Doody, J. S., Rhind, D., Green, B., Castellano, C. M., Sims, R., C. McHenry, and S. Clulow. 2017. Chronic effects of an invasive species on an animal community. *Ecology* 98:2093-2101.

Welsh, M., **Doody, J. S.** and Georges, A. 2017. Resource partitioning among five sympatric species of freshwater turtles from the wet-dry tropics of northern Australia. *Wildlife Research* 44:219-229.

Andrews, R., Pezaro, N., Guarino, E., Green, B., and **Doody, J. S.** 2017. Oviposition to hatching: Development in *Varanus rosenbergi*. *Journal of Herpetology* 51:396-401.

Ferrara, C. R., Vogt, R. C., Eisemberg, C., and **Doody, J. S.** 2017. First evidence of the pig-nosed turtle (*Carettochelys insculpta*) emitting sounds underwater. *Copeia* 105:29-32.

Pezaro, N., **Doody, J. S.**, and Thompson, M. 2017. The ecology and evolution of temperature-dependent reaction norms for sex determination in reptiles: a mechanistic conceptual model. *Biological Reviews* 92:1348-1364.

EDITORIAL AND REVIEWING EXPERIENCE:

2019-present	Associate Editor – <i>Herpetological Review</i> , major articles
2015-2018	Associate Editor – <i>Herpetological Review</i> , <i>Natural History Notes</i>
2009-2015	Associate Editor - <i>Herpetological Conservation and Biology</i>

Curriculum vitae**Michelle L. Green, Ph.D.**

Phone (727) 873-4351

mlgreen1@usfsp.edu

http://www.researchgate.net/profile/Michelle_Green4/**Professional Appointments**

- 2018 – Instructor I, University of South Florida St. Petersburg
- 2008 – Research Associate, The Wild Dolphin Project
- 2018 – Adjunct Research Assistant Professor, University of Illinois
- 2017 – 2018 Research Assistant Professor, University of Illinois
- 2014 – 2017 Visiting Research Assistant Professor, University of Illinois
- 2011 – 2014 Postdoctoral Research Associate, University of Illinois
- 2013 – 2014 Adjunct Graduate Faculty, Missouri State University
- 2008 – 2011 Instructor, Florida Atlantic University
- 2008 – 2011 Instructor, Broward College
- 2003 – 2008 Teaching Assistant, Florida Atlantic University

Education

2008 Ph.D. Integrative Biology, Florida Atlantic University

Dissertation: Assessment of genetic population structure, promiscuity, and paternity in free-ranging Atlantic spotted dolphins, *Stenella frontalis*, in the Bahamas.

Advisors: John Baldwin, Denise Herzing

2000 B.S. Biology, Grand Valley State University, Animal Emphasis**Professional Teaching Experience**

- Genetics** (*PCB3063*), University of South Florida St. Petersburg
- Microbiology** (*MCB3020*), University of South Florida St. Petersburg
- Animal Growth and Reproduction** (*ANSC 224*), University of Illinois
- Invertebrate Zoology** (*ZOO 2203*), Florida Atlantic University
- Invertebrate Zoology** (*ZOO 2203L*), Florida Atlantic University
- Marine Mammal Biology** (*BSC 4930*), Florida Atlantic University
- Principles of Biology** (*BSC 1010L*), Florida Atlantic University
- Biodiversity** (*BSC 1011L*), Florida Atlantic University
- Human Morphology and Function I** (*PCB 3703L*), Florida Atlantic University
- Human Morphology and Function II** (*PCB 3704L*), Florida Atlantic University
- Marine Biology** (*OCB 4043L*), Florida Atlantic University
- Comparative Vertebrate Morphogenesis** (*ZOO 4690L*), Florida Atlantic University
- Human Anatomy & Physiology I** (*BSC 1085L*), Broward College
- General Biology** (*BSC 1005L*), Broward College
- Zoology** (*BSC 2010*), Broward College
- Zoology** (*BSC 2010L*), Broward College
- Introduction to Biology I** (*BSC2010*), University of South Florida St. Petersburg
- Introduction to Biology I** (*BSC1010L*), Broward College
- Introduction to Biology II** (*BSC 1011*), Broward College
- Introduction to Biology II** (*BSC 1011L*), Broward College
- Environmental Science** (*EVR 1009*), Broward College

Select Refereed Publications

- Hughes D, **Green ML**, Warner JK, Davidson PC. (2019) There's a frog in my salad! A review of online media coverage for wild vertebrates found in prepackaged produce in the United States. *Science of the Total Environment*, 675, 1-12. doi: <https://doi.org/10.1016/j.scitotenv.2019.03.254>
- Dorak SJ, **Green ML**, Wander MM, Ruiz MO, Buhnerkempe MG, Tian T, Novakofski JE, Mateus-Pinilla NE*. (2017) Clay content and pH: soil characteristic associations with the persistent presence of chronic wasting disease in northern Illinois. *Scientific Reports* 7:18062 doi: 10.1038/s41598-017-18321-x
- Elliser CR*, MacIver KH, **Green ML** (2017) Group characteristics, site fidelity and photo-identification of harbor porpoises, *Phocoena phocoena*, in Burrows Pass, Fidalgo Island, Washington. *Marine Mammal Science*, doi: 10.1111/mms.12459.
- Herzing DL*, Augliere B, Elliser C, **Green ML**, Pack A (2017) Exodus! Large-scale displacement and social adjustments of resident Atlantic spotted dolphins (*Stenella frontalis*) in the Bahamas. *PLoS one* 12(8): e0180304.
- Green ML***, Herzing DL, Baldwin JD (2015) Molecular assessment of mating strategies in a population of Atlantic spotted dolphins. *PLoS ONE*, 10(2): e0118227, doi:10.1371/journal.pone.0118227
- Green ML***, Herzing DL, Baldwin JD (2011) Reproductive success of male Atlantic spotted dolphins (*Stenella frontalis*) revealed by noninvasive genetic analysis of paternity. *Canadian Journal of Zoology*, 89: 239 – 253, 10.1139/Z10-111

Select Honors, Awards and Competitive Grants

- Center for Produce Safety. 2017. Engineering and ecological approaches reduce Pacific tree frog intrusion into leafy green agriculture. \$259,160.
- Illinois Department of Natural Resources. 2017. Wildlife and chronic wasting disease surveillance (WR146R 13). \$406,643.
- United States Department of Agriculture (USDA) NIFA AFRI REEU. 2016. Training agricultural leaders of tomorrow: bridging the gap between biology and engineering. \$299,925.
- Illinois Department of Natural Resources. 2016. Wildlife and chronic wasting disease surveillance (WR146R 12). \$358,000.
- Distinguished Alumni-In-Residence. 2013. College of Liberal Arts and Sciences, Grand Valley State University

Select Presentations

- Herzing DL, Augliere BN, Elliser CR[†], **Green ML**, Pack AA. Exodus! Large-scale displacement and social adjustments of resident Atlantic spotted dolphins in the Bahamas. 21st Biennial Conference on the Biology of Marine Mammals, San Diego, California, December 2015.
- Green ML**[†], Herzing DL, Baldwin JD. Paternity assessment of Atlantic spotted dolphins (*Stenella frontalis*) in the Bahamas. Southeast and Mid-Atlantic Marine Mammal Symposium (SEAMAMMs). Holling's Marine Laboratory, Charleston, South Carolina, March 2008.
- Green ML**[†], Herzing DL, Baldwin JD. Non-invasive sampling for molecular investigation of free-ranging Atlantic spotted dolphins (*Stenella frontalis*). ConGen3: The Third International Conservation Genetics Symposium. The American Museum of Natural History, New York, New York. September 2007.

Christopher D. Stallings, September 2019
Principal Investigator Biographical Sketch

Email: stallings@usf.edu

Tel: 727-553-3371

Fax: 727-553-1189

Academic Credentials

Institution	Major	Degree	Year
East Carolina University	Biology	B.S.	1999
San Francisco State University	Biology	M.S.	2002
Oregon State University	Zoology (major); Statistics (minor)	Ph.D.	2007

Professional Appointments

2017-pres	Associate Professor, University of South Florida College of Marine Science, St. Petersburg, FL
2011-2017	Assistant Professor, University of South Florida College of Marine Science, St. Petersburg, FL
2009-2011	Assistant in Research (research faculty), Florida State University Coastal and Marine Laboratory, St. Teresa, FL
2007-2009	Postdoctoral Associate, Florida State University Coastal and Marine Laboratory, St. Teresa, FL
2002-2007	Research Assistant, Oregon State University, Corvallis, OR
2001-2002	Research Biologist, California Dept. of Transportation, San Francisco, CA
2000-2001	Scientific Aid, California Department of Fish and Game, Healdsburg, CA
1999	Research Assistant, University of Washington Friday Harbor Laboratories, Friday Harbor, WA
1998-1999	Research Assistant, East Carolina University, Greenville, NC
1998	Biological Technician (GS-4), United States Forest Service, Carson, WA

a. Related Publications (5 of 46 total peer-reviewed publications)

- [1] Kurth, B.N., E.B. Peebles, and C.D. Stallings. In Press. Atlantic Tarpon (*Megalops atlanticus*) exhibit upper estuarine habitat dependence followed by foraging system fidelity after ontogenetic habitat shifts. *Estuarine, Coastal and Shelf Science*.
- [2] Johnson, D.W., M.R. Christie, T.J. Pusack, C.D. Stallings, and M.A. Hixon. 2018. Larval connectivity and persistence of a marine fish metapopulation: implications for designing networks of marine protected areas. *Ecology* 99: 1419-1429.
- [3] Tzadik, O.E., J.S. Curtis, J.E. Granneman, B.N. Kurth, T.J. Pusack, A.A. Wallace, D.J. Hollander, E.B. Peebles, and C.D. Stallings. 2017. Chemical archives in fishes beyond otoliths: A review on the use of other body parts as chronological recorders of microchemical constituents for expanding interpretations of environmental, ecological, and life-history changes. *Limnology and Oceanography Methods* 15: 238-263.
- [4] Koenig, C.C., L.S. Bueno, F.C. Coleman, J.A. Cusick, R.D. Ellis, K. Kingon, J.V. Locascio, C. Malinowski, D.J. Murie, and C.D. Stallings. 2017. The timing of spawning (diel, lunar,

seasonal) in Atlantic Goliath Grouper, *Epinephelus itajara* (Lichtenstein 1822). *Bulletin of Marine Science* 93: 391-406.

- [5] Stallings, C.D., J.A. Nelson, K.L. Rozar, C.S. Adams, K.R. Wall, T.S. Switzer, B.L. Winner, and D.J. Hollander. 2015. Effects of preservation methods of muscle tissue from upper-trophic level reef fishes on stable isotope values ($\delta^{13}\text{C}$ and $\delta^{15}\text{N}$). *Peer-J* 3:e874.

Other Publications (5 maximum)

- [1] Tzadik, O.E., D.L. Jones, E.B. Peebles, C.C. Koenig, and C.D. Stallings. 2017. The effects of spatial scale on assigning nursery habitats in Atlantic Goliath Groupers (*Epinephelus itajara*) using non-lethal analyses of fin rays. *Estuaries and Coasts* 40: 1785-1794.
- [2] Chacin, D.H., T.S. Switzer, C.H. Ainsworth, and C.D. Stallings. 2016. Long-term retrospective analysis of spatio-temporal patterns in population dynamics and demography of juvenile Pinfish (*Lagodon rhomboides*). *Estuarine, Coastal, and Shelf Science* 183: 52-61.
- [3] Stallings, C.D., A. Mickle, J.A. Nelson, M.G. McManus, and C.C. Koenig. 2015. Faunal communities and habitat characteristics of the Big Bend seagrass meadows, 2009-2010. *Ecology* 96: 304 (Ecological Archives E096-030).
- [4] Pusack, T.J., M.R. Christie, D.W. Johnson, C.D. Stallings, and M.A. Hixon. 2014. Spatial and temporal patterns of larval dispersal in a coral-reef fish metapopulation: evidence of variable reproductive success. *Molecular Ecology* 23: 3396-3408.
- [5] Nelson, J.A., C.D. Stallings, W.M. Landing, and J. Chanton. 2013. Biomass transfer subsidizes nitrogen to offshore food webs. *Ecosystems* 16: 1130-1138.

b. Related Archived Data Sets (5 maximum)

- [1] Dataset for: Dornelas, M., C.D. Stallings, et al. (254 coauthors). 2018. BioTIME: a database of biodiversity time series for the Anthropocene. *Global Ecology and Biogeography* 27: 760-786.
- [2] Dataset for: Stallings, C.D., A. Mickle, J.A. Nelson, M.G. McManus, and C.C. Koenig. 2015. Faunal communities and habitat characteristics of the Big Bend seagrass meadows, 2009-2010. *Ecology* 96: 304 (Ecological Archives E096-030); DOI: 10.1890/14-1345.1; <http://www.esapubs.org/archive/ecol/E096/030/>
- [3] Data on abundance, size composition, life history, and habitat of reef-associated fishes from the eastern Gulf of Mexico (2012-2013) from fishery-independent hooked-gear surveys; housed at the Florida Fish and Wildlife Conservation Commission, Fish and Wildlife Research Institute

Other Archived Data Sets (5 maximum)

- [1] Dataset for: Simard, P., K.R. Wall, D.A. Mann, C.C. Wall, and C.D. Stallings. 2016. Boat visitation rates at artificial and natural reefs in the eastern Gulf of Mexico using acoustic recorders. *PLoS One* 11:e0160695; DOI: 10.1371/journal.pone.0160695; <http://journals.plos.org/plosone/article?id=10.1371%2Fjournal.pone.0160695#sec005>

Agenda Item: FL 114

USF Board of Trustees
December 3, 2019

Issue: Master of Science Marriage and Family Therapy – CIP 51.1505

Proposed action: Approval

Executive Summary:

The proposed master's degree in Marriage and Family Therapy (MFT) is a terminal degree that will train and educate students to be competent marriage and family therapists who will help to meet the growing job demand for the state of Florida. Graduates of the program will be eligible for licensure in the state of Florida as marriage and family therapists and will be employable in behavioral health agencies, private practice, hospitals, Veteran Affairs (VA), and both residential and outpatient facilities.

The proposed curriculum is based on Florida's state licensure requirements, American Association for Marriage and Family Therapy (AAMFT) Code of Ethics, Marriage and Family Therapy core competences, the Association of Marital and Family Therapy Regulatory Boards (AMFTRB) National licensure examination domains, and national accreditation standards from the Commission on Accreditation for Marriage and Family Therapy Education (COAMFTE). COAMFTE has been recognized by the U.S. Department of Education as the national accrediting body for the field of marriage and family therapy.

Financial Impact:

There will be no financial impact because existing faculty and resources will be reallocated for this new degree program.

Strategic Goal(s) Item Supports:

Strategic Plan Goal 1: Well-educated and highly skilled global citizens through our continuing commitment to student success.

BOT Committee Review Date: November 20, 2019

Supporting Documentation Online (please circle): Yes

No

USF System or Institution specific: University of South Florida

Prepared by: Ryan Henry, Ph.D., LMFT, Clinical Instructor

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 2020

University Submitting Proposal

Proposed Implementation Term

Behavioral and Community Sciences

Child and Family Studies

Name of College(s) or School(s)

Name of Department(s)/ Division(s)

Marriage and Family Therapy

M.S. in Marriage and Family Therapy

Academic Specialty or Field

Complete Name of Degree

51.1505

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)	
	HC	FTE
Year 1	16	20
Year 2	32	40
Year 3	32	40
Year 4	40	50
Year 5	48	60

Projected Program Costs (From Table 2)				
E&G Cost per FTE	E&G Funds	Contract & Grants Funds	Auxiliary Funds	Total Cost
\$19,936	\$387,917	0	0	\$387,917
\$6,972	\$418,338	0	0	\$418,338

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 proposed master's degree, in Marriage and Family Therapy (MFT), is a 60-credit hour terminal degree. The proposed program will train and educate students to be competent marriage and family therapists who will help to meet the growing job demand for the state of Florida. Graduates of the program will be eligible for licensure in the state of Florida as marriage and family therapists.

The proposed curriculum includes no concentrations, emphases, tracks or specialization. It is based on Florida's state licensure requirements, American Association for Marriage and Family Therapy (AAMFT) Code of Ethics, Marriage and Family Therapy core competences, the Association of Marital and Family Therapy Regulatory Boards (AMFTRB) National licensure examination domains, and national accreditation standards from the Commission on Accreditation for Marriage and Family Therapy Education (COAMFTE). COAMFTE has been recognized by the U.S. Department of Education (USDE) as the national accrediting body for the field of marriage and family therapy. A thesis option is available for students interested in pursuing a Ph.D. in Marriage and Family Therapy after successfully completing the master's degree. With COAMFTE accreditation, our graduates will be a good fit for FSU's COAMFTE accredited Ph.D. program in MFT.

Graduates from the proposed program will be employable in behavioral health agencies, private practice, hospitals, Veteran Affairs (VA), and both residential and outpatient facilities. In order for graduates to be more competitive for employment with the VA, we will be working to officially create a MFT training partnership between USF and the VA. To develop a MFT training partnership with the VA the master's degree program, the VA requires the program receive COAMFTE accreditation. There are no COAMFTE accredited MFT master's degree programs in the State University System (SUS). Once we receive our accreditation, we will actively pursue a partnership with James A. Haley VA, located nearby the USF Tampa campus. This partnership will permit students to complete practicum hours at the VA and also lead to job placements for graduates interning in the VA system.

- 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 preproposal was presented at the November 29, 2018 CAVP Academic Program Coordination Review Group meeting and no concerns were expressed.

- 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

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](#)).

Statue University System Goals	Excellence	Productivity	Strategic Priorities for a Knowledge Economy
Teaching & Learning (Graduate)	✓✓ Strengthen Quality & Reputation of Academic Programs and Universities (Eligible programs with Specialized Accreditation)	✓✓ Increase Degree Productivity and Program Efficiency (Increase Graduate Degrees awarded annually)	✓✓ Increase the Number of Degrees Awarded in Areas of Strategic Emphasis (Graduate degrees in health)
Scholarship, Research, and Innovation	Strengthen Quality & Reputation of Scholarship, Research, and Innovation	Increase Research Activity	Increase Collaboration and External Support for Research Activity
Community & Business Engagement	✓ Strengthen Quality & Recognition of Commitment to Business & Community	✓✓ Increase Levels of Community & Business Engagement (percentage of students participating in community engagement activities)	✓ Increase Community and Business Workforce

✓ Indirectly support SUS strategic planning goals

✓✓ Directly support SUS strategic planning goals

The proposed program will address the following SUS strategic goals.

- Strengthen Quality and Reputation of the University - USF will be seeking COAMFTE accreditation.
- Increase the Number of Degrees Awarded in Areas of Strategic Emphasis - The CIP Code USF is seeking for this program is 51.1505, which is recognized by the BOG as a PSE in Critical Workforce: Health.
- Increase Levels of Community and Business Engagement - Students in the program will be improving the health of our community and influencing positive societal change as our students work with individuals, families, and couples during their field placement and in their careers as a licensed marriage and family therapist.
 - On a yearly basis, our students will provide over 24,000 hours of free services to the community during their clinical field experience. A majority of these hours will be providing family and couples therapy to underserved populations in our local communities.
- Increase Community and Business Workforce -- Many of our graduates will become entrepreneurs in the state as they start their own private practice business.

- 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](#).

CIP code 51.1505 is an approved program of strategic emphasis in the area of Health.

- 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 on USF's 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.**

In 2017, the University of South Florida hired the Educational Advisory Board (EAB) (Appendix C) to conduct an analysis of promising graduate programs for development at the University. In their final report, they identified the five most promising graduate program opportunities based on analysis of current and expected regional workforce demand and the colleges' existing academic programs. A master's degree in Marriage and Family Therapy was identified as one of the top 5 graduate programs to develop at the University.

Nationwide:

According to Burning Glass data, nationwide there were 18,318 job postings in the last 12 months. In the next 8 years, the projected growth rate is considered high. The nationwide employment of marriage and family therapists is projected to grow 22% from 2018 to 2028, much faster than the average for all occupations. According to the U.S. Bureau of Labor Statistics, the median annual wage in 2018 for marriage and family therapists was \$50,090. (BLS url: <https://www.bls.gov/ooh/community-and-social-service/marriage-and-family-therapists.htm>, visited 9/16/2019).

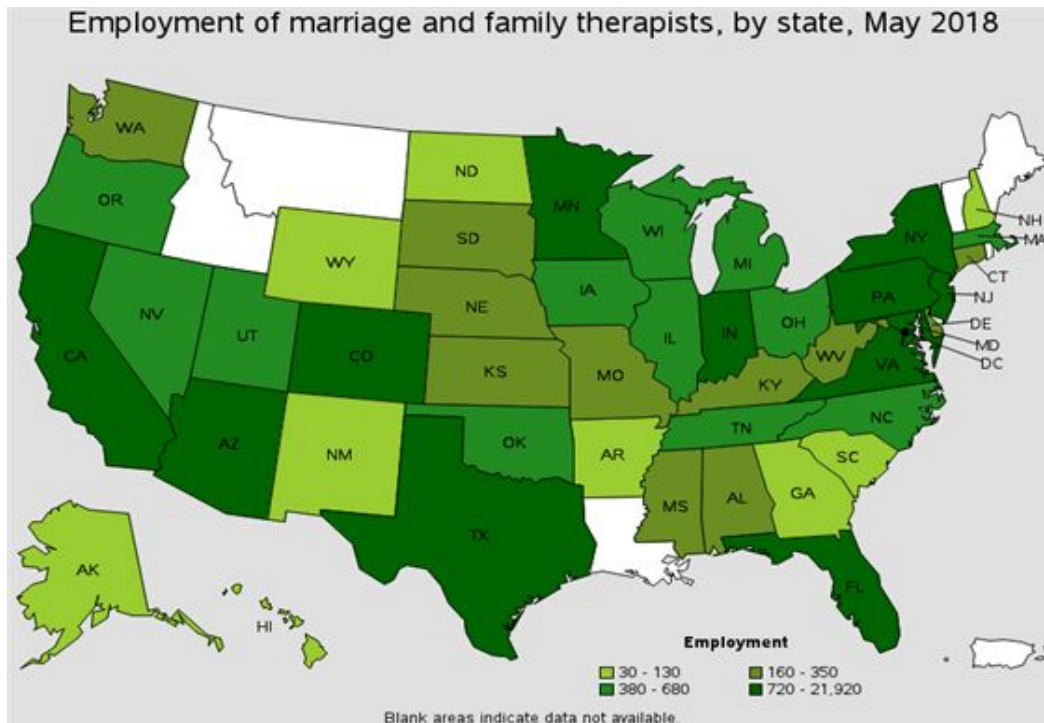
Below is a list of the five top industries that employ marriage and family therapists in the nation.

Industry	Employment	Hourly Mean Wage	Annual Mean Wage
Individual and Family Services	16,300	\$23.94	\$49,790
Offices of Other Health Practitioners	10,610	\$25.43	\$52,890
Outpatient Care Centers	6,510	\$27.74	\$57,700
State Government, excluding schools and hospitals (OES Designation)	4,820	\$33.21	\$69,080
Residential Intellectual and Developmental Disability, Mental Health, and Substance Abuse Facilities	2,910	\$24.99	\$51,970

Source: Bureau of Labor Statistics (url: <https://www.bls.gov/oes/current/oes211013.htm#st>, visited 9/16/2019).

Florida:

Florida has the third highest employment rate for marriage and family therapists according to the U.S. Bureau of Labor Statistics. Based on reports from Burning Glass (see Appendix C), employer demand is considered high for the state of Florida. In the last 12 months, there were 718 job postings in Florida for which graduates of the program would be qualified. A 33% projected employment growth is expected between 2016-2026 in the state of Florida according to Projections Central State Occupational Projections (url: <https://projectionscentral.com/Projections/LongTerm>, visited 9/16/2019). According to U.S. Bureau of Labor Statistics, the annual mean wage in Florida for a marriage and family therapist is \$50,680.



Source: Bureau of Labor Statistics (url: <https://www.bls.gov/oes/current/oes211013.htm#st>, visited 9/16/2019).

Top 5 State Employment of Marriage and Family Therapist - May 2018

State	Employment	Hourly Mean Wage	Annual Mean Wage
California	21,920	\$24.98	\$51,950
New Jersey	4,150	\$34.80	\$72,380
Florida	2,810	\$24.37	\$50,680
Pennsylvania	2,090	\$28.08	\$58,400
Arizona	1,410	\$23.26	\$48,390

Source: Bureau of Labor Statistics (url: <https://www.bls.gov/oes/current/oes211013.htm#st>, visited 9/16/2019).

Tampa Bay Area:

According to data from Burning Glass, in the last 12 months there were 170 jobs posted in the Tampa, St Petersburg, and Clearwater area for which graduates from this program would be qualified. Based on data from these job postings the local average salary for these positions was \$46,334, compared to the average living wage for the Tampa Bay area, which is at \$29,141.

Overall, the field of marriage and family therapy has a strong employment growth rate and livable annual salaries. Based on the current number of degrees conferred in the SUS (30) there is a need for another program to train qualified MFT's to meet the projected employment growth.

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.

Two surveys were conducted in an attempt to gather data on the interest of students in applying to the proposed MFT master's degree (see Appendix C). The first survey was conducted with current students in the 15-credit hour MFT graduate certificate. The MFT graduate certificate has existed since 1999 and has been accepting 15 to 20 new applicants each year from various counseling programs at USF (Social Work, School Counseling, Rehabilitation and Mental Health Counseling {RMHC}, Psychology). Current MFT certificate students were asked, "If given the option between a 15-credit hour MFT certificate or a 60-credit hour MFT master's degree, which would you choose?" The results were that 67% said they would choose the 60-credit hour MFT degree. The answer to this question and the follow-up questions informed us of a desire from current certificate students to have more coursework offered in the field of MFT. It also informed us that there was still a desire by 33% of the students to have the MFT certificate as an option for students wanting some coursework in MFT but wanting to maintain a focus on another counseling field. This feedback helped in deciding to maintain the 15-credit hour MFT certificate even after the proposed program begins.

In the second survey, we asked undergraduate majors in Psychology and Behavioral Healthcare programs at USF, "Are you personally interested in obtaining a master's degree in MFT?" The results were that out of the 120 students who responded, 82% reported being interested in obtaining a MFT degree. Based on the results of these two surveys as well as the long-term success of the 15-credit hour graduate certificate in MFT, there is a clear interest by students to enter the field of Marriage and Family Therapy and in having a MFT master's degree option at USF.

- 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.**

Based on data from the state, there are two public universities that have similar programs. There are also a handful of private universities with similar programs. Currently, the University of Florida and the University of Central Florida are the only two Marriage and Family Therapy master’s degrees in the SUS. Both programs are accredited by the Council for Accreditation of Counseling and Related Educational Program (CACREP), which is a very strong and established accrediting body for Mental Health Counseling. The MFT programs fall under a specialty area, which is connected with each university’s Mental Health Counseling master’s degrees. USF’s proposed program will be unique in that it will be the first MFT program in the SUS to be accredited by COAMFTE, which is recognized by the American Association of Marriage and Family Therapy (AAMFT) and the Council on Higher Education Accreditation (CHEA), as the only accrediting agency for graduate degrees and clinical training programs in MFT in the United States and Canada. Seeking, COAMFTE accreditation will also help to strengthen the professional identity of MFT’s in the state of Florida. The three private universities with master’s degrees in marriage and family therapy vary in the accreditations they hold and the number of students with conferred degrees. NOVA is the only private university that is accredited by COAMFTE and they also are the largest.

In 2017, there were 114 master’s degrees in Marriage and Family Therapy conferred among all public, private, and for-profit universities in the state of Florida (please see the following chart). The public universities only have about 23% of the market share. There are no universities in the Tampa, St Petersburg, or Clearwater area that offer an MFT program. The closest programs to the University of South Florida are UCF in Orlando (1hr 45 min), University of Florida in Gainesville (1hr 48min), Stetson in DeLand (2hr 30min), NOVA in Davie (3hr 46 min), and Palm Beach Atlantic University in West Palm Beach (3hr 29 min). The proposed program is 60% similar to all these programs due to the requirements of licensure as a Marriage and Family Therapist. We have reached out to the different universities and have heard back from several programs that reported an interest in collaborating around research opportunities (refer to Appendix C).

University	Degree	Accreditation	Institution Type	Credit Hours	Conferred Degrees in 2017
UCF	Marriage, Couple, and Family Therapy M.A.	CACREP	Public	63	23
UF	Marriage and Family Counseling M.Ed./Ed.S.	CACREP	Public	72	7
NOVA	Family Therapy M.S.	COAMFTE	Private	60	57
Stetson	Marriage, Couple and Family Counseling M.S.	CACREP	Private	60	11
Palm Beach Atlantic	Marriage and Family Counseling M.S.	None	Private	60	16

Source: Burning Glass

- 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 program will be accepting 16 students during the first year and by Year 5 we will have 48 in the program at any one time. We will not be able to seek COAMFTE accreditation until the first cohort of students graduate and we are able to collect data on the effectiveness of the program. Since we will not be accredited during the first few years of the program's existence, we have decided to accept less students. The other reason we have decided on 16 students in Year 1 is that accreditation standards set the cap at 8 students for practicum courses. Therefore, accepting 16 students will allow us to fill two sections of the practicum. Once we obtain accreditation, we will be able to attract a larger student body, and we will move up to 24 students per year, which would be 3 sections of the practicum. The reason we are setting limits to 24 new students a year is due to the caps that are placed on field placement and clinical courses by our accrediting body. Since the program is a 2-year program and 60 credit hours are required to complete the program, FTE calculations were based on 30 credits a year instead of the normal 24 credit hours associated with graduate work.

- 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 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 Child and Family Studies (CFS) and more specifically the Rehabilitation and Mental Health Counseling (RMHC) program has a history of recruiting a diverse student body. In 2018, the RMHC program recruited a cohort of students, which consisted of, 35% Hispanic, 10% African American, 5% other, and 87% women. These percentages are indicative of the efforts to recruit a diverse student body who are already in place. The proposed program hopes to increase enrollment of African Americans as well as male students of all backgrounds. In order to achieve this, we will create a targeted recruitment plan.

Our first step will be to invest in a list of targeted GRE test takers using specific search criteria. We will reach out to prospective students who intend on pursuing graduate studies in counseling or a related field based on ethnic background, current location, and test scores. By using these search criteria, we will intentionally reach out to self-identified prospective students of color from all areas of Florida interested in this type of graduate school.

Our targeted recruitment will include email campaigns, mailers, invitations to events, and phone calls. In these marketing materials, we will celebrate students of color, community partners serving individuals from diverse backgrounds, as well as recipients of the AAMFT Minority Fellowship Program; a program dedicated to expanding the delivery of culturally competent mental health and substance abuse services to underserved minority populations, and increasing the number of culturally competent Marriage and Family therapists (url: https://www.aamftfoundation.org/Foundation/What_We_Do/Minority_Fellowship_Program.aspx, visited 9/16/2019).

As the program grows, we will look for new ways to build an ethnically diverse and welcoming student

community. Since, FAMU and FIU do not offer an M.S. in Marriage and Family Therapy, this proposed program with its demonstrated diversity, offers a good option for students of diverse backgrounds who are interested in marriage and family therapy.

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 proposed degree program, which is \$387,917 in year 1 and \$418,338 by year 5. It is important to note that the new program will share 7 courses with the RMHC program. Out of those 7 courses, 6 will not need any additional sections added to accommodate the students from the proposed program even at year 5. Students from the proposed program will be filling empty seats in existing sections of the courses already being taught in RMHC. The budget numbers in Table 2 under faculty salary and benefits includes the faculty salaries and benefits that will result from these shared courses. In addition, we are not hiring a new staff position for the proposed program but will be sharing the current staff support with the RMHC program and reallocating a percent of staff's time to the proposed program. That time allocation is reflected in the A&P salaries and benefits (\$21,937 Year 1 and \$23,743 Year 5). The other personal services line of the budget is \$16,000, which are funds set aside for adjunct faculty and OPS support staff. The expense line of the budget of \$11,300 includes; travel, computers, marketing, office supplies, printing, and accreditation fees. The Year 5 faculty and A&P salary and benefits cost increase is due to a shared course that is not taught until year 2 of the program and a 2% raise for faculty and staff each year. There is also a slight increase of \$700 in the expense category to adjust for expected increases in the cost of supplies and Accreditation fees over the five years.

Table 3 identifies where funds for the new program will be reallocated. The RMHC program will be reallocating one faculty line and a percent of three other faculty salaries to teach shared courses in the program. They will also be reallocating a percent of the support staff salary to help run the proposed program. In total, RMHC will reallocate \$181,697. The College of Behavioral and Community Sciences will reallocate two new faculty lines and an expense budget to cover the cost of running the program (adjuncts, OPS staff, office supplies, computers, travel, marketing, and the cost of accreditation). In total, the College will be reallocating \$206,220 to the new program. The total, of reallocated funds to support the new program is \$387,917.

- 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.**

There is no plan to operate this graduate 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).

The current Rehabilitation and Mental Health Counseling (RMHC) program will have a percentage of 3 faculty and 1 staff member's time reallocated to the proposed program. The justification for the reallocation is that the proposed program will be sharing 7 courses with RMHC, which will benefit both programs' ongoing expenses and resources. In Year 2 of the proposed program, the RMHC program will request a faculty line to replace Dr. Henry's teaching, advising, and committee workload with existing College funds. No undergraduate program will be affected by the new master's degree and the new program will provide an additional option for undergraduates to pursue a master's degree at USF. Enrollment in the proposed program is not anticipated to have a substantive impact on any other master's programs within the Department, College, and USF. The RMHC program is currently only accepting around 40 percent of students who apply to the program. Therefore, even if the new program impacts a small number of applicants who would have normally applied to the RMHC program, the RMHC program still has a large enough pool of applicants that they will not be negatively impacted by the addition of the MFT program.

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 program will be the fourth master's degree offered in the Department of Child and Family Studies. Currently, all three master's programs within the Department have a director that reports directly to the Chair of the Department of Child and Family Studies (CFS). All program directors serve on the CFS leadership team to coordinate the academic efforts of the entire department. The MFT Director reports directly to the Chair and will work closely with the RMHC director to coordinate shared courses and resources. The Department has the structure and systems in place to expand and support an additional degree program. In addition, the RMHC master's degree will continue to offer its 15-credit hour graduate certificate in MFT, which will require additional sections of some MFT courses to be taught once the proposed program is established. Three new electives will be offered in connection with the proposed program, which will be shared, and open to students from either program. There is only one prerequisite for the new program, a statistics course. However, this is a common course already taken in many undergraduate degrees and should not impact any specific course on campus.

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.

We are in the process of establishing field placement sites in the community that are working from an integrated healthcare approach. With these partnerships, the proposed program will be eligible to seek federal funding through the Behavioral Health Workforce Education and Training (BHWET) program (<https://bhw.hrsa.gov/fundingopportunities/?id=67ee4161-1b08-433d-8224-d1e009af2663>, visited 9/16/2019). The program is run through the Health Resources & Services Administration (HRSA) and is funded at the level of \$2 million over 4 years to increase the number of well-trained behavioral health care professionals serving high priority populations with integrated care. This funding will go to support the program's training of students and to community partners performing the integrated care. The proposed program will also continue to pursue private donors to support the mission of the program through our MFT fund, which has already been established in connection with the graduate certificate in MFT.

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 proposed program will benefit USF's reputation, as it will open new opportunities for research and grants. The University will also benefit from the new program seeking national accreditation and increasing student credit hours (SCH). The proposed program will positively impact the community with students providing roughly 24,000 volunteer hours each year to mostly underserved populations in the Tampa Bay area. The proposed program will benefit the state in training qualified marriage and family therapists to become licensed and meet the workforce demands of state and local communities. It will also support the BOG's and the State of Florida's efforts to increase mental health counseling funding and initiatives. The projected growth rate for the field of Marriage and Family Therapy in Florida is 33%. Providing additional trained professionals to work with couples and families, although hard to measure, will not only impact the family unit but also the community and state in which they live.

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

- 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

- 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

- 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

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 goal of the new program will be to train and educate students to become competent in the areas of theory, clinical practice, and research in the field of marriage and family therapy and to prepare students to be eligible for licensure in the state of Florida. These goals relate to the mission of the SUS to provide the highest quality research and education through a coordinated system to meet the diverse needs of the state. Specifically, the proposed program will expand the number of Marriage and Family Therapy programs offered in the SUS from 2 to 3 programs. The proposed program will also seek COAMFTE accreditation, which will be the first SUS MFT program to do so. This will guarantee that the program is meeting the highest standards of training in the field. The program will also help to meet the job growth demand for licensed marriage and family therapists in the state of Florida. It will support the strategic priority of USF and the SUS to increasing the number of graduate degrees in Health. It will improve the health of our community and influencing positive societal change as our students work with individuals, families, and couples during their field placement and in their careers as a licensed marriage and family therapist.

- 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.**

USF Health, the James A. Haley Veteran's Hospital, and Moffitt Cancer Center all provide an ideal situation for training family therapist to work in an integrated health care system. The new program will provide electives and coursework on medical family therapy, integrated health, working with military families, and working with trauma. The proposed program will also have the benefit and expertise of faculty from the RMHC program who will be teaching courses in their areas of specializations. The proposed program is also a part of a department that will provide numerous opportunities for interdisciplinary research. The Department of Child and Family Studies currently manages a portfolio of contracts and grants totaling \$45.2 million dollars. USF has undergraduate degrees in behavioral health, public health, sociology, social work and psychology that would naturally feed into a master's degree in Marriage and Family Therapy. The master's in MFT will also add another program of strategic emphasis in Health to USF's portfolio.

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.

Initial planning for the new program began with discussions about the feasibility and impact that a new master’s degree would have on CFS as a whole and on the RMHC program specifically. Once a decision was made to move forward as a department, we approached the Dean’s office for support of the new program with a new faculty hire and funds that would be required. Once the Dean approved moving forward with the pre-proposal, there was a series of meetings to discuss the pre-proposal timeline and requirements. The pre-proposal moved through the committees and was approved by the CAVP Academic Program Coordination review group on November 29, 2018.

Following the pre-proposal approval, meetings were held to discuss the timeline and requirements of the full proposal. As the proposal was being drafted, various meetings were held to obtain final approval of the budget from the Dean’s office. An advisory board was formed¹, and they met to review the curriculum and the field placement component of the program. Members of the Advisory Board are made up of marriage and family therapist working in the community in both public and private companies. Feedback from these meetings was incorporated into subsequent drafts of the proposal until it made its way to the college curriculum committee review process.

Planning Process

Date	Participants	Planning Activity
4-10-18	Ryan Henry, Instructor; Chair of CFS, Mario Hernandez; and RMHC Director, Chih-Chin Chou	Identified impact new proposed program would have on current RMHC program and discussion of sharing courses and resources.
4-23-18	Ryan Henry; Associate Dean, Ruth Bahr; Associate Director, Cynthia Brown Hernandez	Identified timeline for the pre-proposal and new degree proposal, academic resources for putting together the proposal, and CIP code
5-29-18	Ryan Henry; Associate Dean, Catherine Batsch; Dean, Serovich	Discussed feasibility of MFT master’s program and approved the needed resources from CBCS
6-18-18	Ryan Henry	Conducted two online surveys of undergraduate and graduate students to assess interest in USF having a MFT master’s degree
7-10-18	Ryan Henry; Cynthia Brown Hernandez	Accessed Burning Glass data for degrees earned and employment needs
7-11-18	Ryan Henry; Associate Director in BCS, Lynn Clingan	Reviewed draft of pre-proposal before sending it to the Department and College Curriculum Committees
8-1-18	Ryan Henry; CFS Curriculum Committee	Department approval of the pre-proposal

¹ MFT Advisory Board Members:

- Allison Zangari, LMHC, LMFT, CRC
- Dr. Jeanne Peterson, PsyD
- Monica Burton, LMFT
- David Swidall, M.Div., LMFT
- Thomas Brown, M.Div., LMHC, LMFT, NCC

8-13-18	Ryan Henry; CBCS Curriculum Committee	College approval of the pre-proposal
9-10-18	Ryan Henry; Grad Council Curriculum Committee	USF's Graduate Council's Curriculum Committee approval of the pre-proposal
9-24-18	Full Graduate Council	USF's Graduate Council pre-proposal approval
10-11-18	Dean Serovich; Cynthia Brown; APAC Members	USF's Academic Program Advisory Council (APAC) approval of pre-proposal
11-29-18	Members of the CAVP Academic Program Coordination Review Group	CAVP APC Review Group expressed no concerns with the pre-proposal
12-5-18	Ryan Henry; Cynthia Brown Hernandez	Planning meeting to start writing the full proposal.
5-3-19	Ryan Henry; Librarian, Claudia Dold	Report from the Library on any additional resources they would need to support the proposed program
5-14-19	USF's BOT's Academics and Campus Environment (ACE) Committee	Approval of USF's Accountability Plan
6-4-19	USF's Board of Trustees	Approval of USF's Accountability Plan
6-11-19	Florida Board of Governors	Approval of USF's Accountability Plan

Events Leading to Implementation

Date	Implementation Activity
March 29, 2019	Meeting with Advisory Board (reviewed proposed curriculum and field placement)
August 2019	Hired clinical instructor/field placement coordinator 12-month faculty
August - December 2019	Create new courses and receive approval through the curriculum process
August 16, 2019	College Committee approves full proposal
September 9, 2019	USF's Graduate Council Curriculum Committee approves full proposal
September 23, 2019	USF's Full Graduate Council approval
October 17, 2019	USF's APAC approval
November 20, 2019	USF's ACE Committee approval
December 3, 2019	USF's Board of Trustees approval
Pending	Board of Governors' staff review and added to the Academic Program Inventory
Pending	Recruit first cohort of students
Pending	Inclusion in the 2020-2021 Graduate Catalog
Pending (August 2020)	Hire a tenure earning 9-month faculty with the start date of Aug 2020
Pending (August 2020)	Full Program implementation (anticipated Fall 2020)

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.

No accreditation review or program site visits have occurred in the development of the proposed program. The RMHC program is accredited by CACREP but they have not had a site visit in over four years. Even though we will be sharing courses with the RMHC program those specific courses will have to meet the standards of both CACREP and COAMFTE. Accreditation will be sought after the first cohort of students completes the program. The proposed program is being developed with COAMFTE accreditation standards as the guide for curriculum development, faculty credentials, and field placement requirements. In addition to using accreditation standards to guide the development of the program, we have formed an advisory board made up of professionals in the community who are marriage and family therapists or community partners who have a shared interest in the training of MFTs to service their clients. We met with our newly formed advisory board in March 2019 to get their feedback on the proposed curriculum and field placement experience. Their feedback led to several changes in what was emphasized in the curriculum as well as how the field placement was structured. We also took into account feedback we have received from current students in the RMHC program who responded to our surveys. In the future, we will implement a formal process for students to provide feedback to the program at the conclusion of their degree. This data collected from students about their experience in the program will then be reviewed by the faculty and the advisory board in determining continued improvement to the program on a yearly basis.

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.

At the completion of the proposed program, students should be able to:

- Justify their behaviors in a clinical setting based on AAMFT code of ethics and Florida statutes;
- Analyze and critique current research to inform their clinical practice;
- Apply their knowledge of systemic theory, models of MFT, and therapy skills in their clinical work with individuals, families, and couples;
- Adapt their clinical work with individuals, families, and couples based on contextual factors such as cultural, gender, health, sexuality, religion etc.;
- Distinguish between the various employment opportunities in the field based on life goals and clinical specializations.

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

Admissions Standards:

Applicants to the proposed program are expected to meet the University's admission requirements as well as requirements of the proposed graduate program.

- University requirements
 - <https://www.usf.edu/admissions/graduate/admission-information/requirements-deadlines.aspx> (link added August 2019)
- Program requirements
 - Three letters of recommendation (at least two need to be academic letters)
 - A statement of intent/purpose
 - A current resume

- Official GRE scores (on average a combined score of 300)
- Interview with faculty members

Prerequisite:

- A statistics course, 3000 level or above. Course must be completed before the first semester of admissions to the proposed program.

Graduation Requirements:

- Complete all required graduate course work (60 credit hours) with a 3.0 GPA or better in each course.
- Complete 500 hours of face-to-face clinical hours over (4) semesters of field experience
 - 40% of the hours (200) must be relational
 - Maximum of 100 hours of group or live reflecting teams can be counted as part of the 500 hours
- Complete an integrative capstone experience
 - Theory of change/therapy presentation and paper during final semester in Practicum IV
- Defend thesis (if applicable)

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 proposed program is 60 credit hours over 6 semesters. The proposed curriculum is based on Florida State licensure requirements, AAMFT Code of Ethics, MFT core competences, the National licensure examination domains, and on national accreditation standards from COAMFTE. There will be a total of 12 credit hours of field placement throughout the last (4) semesters of the program. In total, students will complete 500 hours of face-to-face clinical hours with individuals, couples, and families during their field placements. Students will have 6 credit hours of approved electives. There will be a thesis option for students who are interested in pursuing a PhD at the conclusion of their program. Students completing a thesis will use 6 credit hours of electives as thesis credits.

Core Courses: 42 credit hours

- | | |
|--|---------|
| • MHS 5020 Foundations of Mental Health Counseling | 3 hours |
| • MHS 6781 Legal and Ethical Issues in Marriage and Family Therapy (new) | 3 hours |
| • MHS 6120 Introduction to Systems Theory (new) | 3 hours |
| • RCS 6440 Social and Cultural Foundations of Counseling | 3 hours |
| • MHS 6430 Dynamics of Family Therapy (new) | 3 hours |
| • RCS 6408 Diagnosis and Treatment of Psychopathology | 3 hours |
| • RCS 6740 Research and Program Evaluation | 3 hours |
| • RCS 6456 Counseling Approaches for Substance Abusers | 3 hours |
| • MHS 5480 Human Growth and Development | 3 hours |
| • RCS 6476 Human Sexuality Counseling | 3 hours |
| • MHS 6210 Assessment in Marital and Family Therapy (new) | 3 hours |
| • MHS 6438 Family Therapy Theories and Techniques (new) | 3 hours |
| • MHS 6432 Marital Therapy Theories and Techniques (new) | 3 hours |
| • MHS 6110 Contemporary and Community issues in MFT (new) | 3 hours |

Field Placement: 12 credit hours

- MHS 6947 Marriage and Family Therapy Practicum I-IV (new) 3 hours
Students register for the practicum course in four different semesters, for a total of 12 credit hours

Non-Thesis Option/Electives: 6 credit hours

Choose two from the following list of electives:

- MHS 6100 Medical Family Therapy and Integrated Healthcare 3 hours
- MHS 6462 Trauma Informed Individual, Family, and Couple Treatment 3 hours
- MHS 6423 Individual & Family Treatment with Children & Adolescents 3 hours
- RCS 6510 Group Theories and Practice 3 hours

OR

Thesis Option: 6 credit hours

- MHS 6971 Marriage and Family Therapy Thesis 6 hours

D. Provide a sequenced course of study for all majors, concentrations, or areas of emphasis within the proposed program.**Fall 1:** 15 credit hours

MHS 5020 Foundations of Mental Health Counseling
 MHS 6781 Legal and Ethical Issues in Marriage and Family Therapy
 MHS 6120 Introduction to Systems Theory
 RCS 6440 Social and Cultural Foundations of Counseling
 Elective 1

Spring 1: 15 credit hours

MHS 6430 Dynamics of Family Therapy
 RCS 6408 Diagnosis and Treatment of Psychopathology
 RCS 6740 Research and Program Evaluation
 RCS 6456 Counseling Approaches for Substance Abusers
 RCS 6476 Human Sexuality Counseling

Summer 1: 9 credit hours

MHS 6947 Marriage and Family Therapy Practicum I-IV
 MHS 5480 Human Growth and Development
 Elective 2

Fall 2: 9 credit hours

MHS 6210 Assessment in Marital and Family Therapy
 MHS 6438 Family Therapy Theories and Techniques
 MHS 6947 Marriage and Family Therapy Practicum I-IV

Spring 2: 9 credit hours

MHS 6432 Marital Therapy Theories and Techniques
 MHS 6110 Contemporary and Community Issues in MFT
 MHS 6947 Marriage and Family Therapy Practicum I-IV

Summer 2: 3 credit hours
MHS 6947 Marriage and Family Therapy Practicum I-IV

Total credit hours: 60

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

MHS 5020 Foundations of Mental Health Counseling

A skill-building course on the utilization of one's self in mental health counseling relationships. Includes study of the origin, history, professional functions, and current issues in the discipline of mental health counseling.

MHS 6781 Legal and Ethical Issues in Marriage and Family Therapy

An overview of all aspects of professional functioning in the field of Marriage and Family Therapy including history, roles, organizational structures, AAMFT code of ethics, and MFT licensure standards. Contemporary and developing issues in the field of professional counseling will also be addressed.

MHS 6120 Introduction to Systems Theory

The course will provide an overview of the historical development of the relational/systemic perspective and contemporary conceptual foundations of MFTs including General System's theory as well as first and second order cybernetics. Application of general systems theory to family and larger systems will be discussed.

RCS 6440 Social and Cultural Foundations of Counseling

Counseling issues in a multicultural and diverse society. Special emphasis on psychosocial adjustment and counseling for individuals with physical and mental disabilities.

MHS 6430 Dynamics of Family Therapy

An overview of the contemporary models of MFT as well as the basic skills for the practice of marriage and family therapy. The biopsychosocial perspective will be explored as well as evidence-based practices in the field of MFT.

RCS 6408 Diagnosis and Treatment of Psychopathology

Psychopathology as applied to psychotherapy and case management in mental health, addictions, and other rehabilitation settings.

RCS 6740 Research and Program Evaluation

Training in the evaluation and utilization of available research studies and the development of research skills. An individual research project is required.

RCS 6456 Counseling Approaches for Substance Abusers

The focus of this course is on deepening the student's understanding of the practice of addictions counseling with an emphasis on biopsychosocial multidisciplinary intervention

MHS 5480 Human Growth and Development

Human development theory as applied in psychotherapy and case management rehabilitation, mental health, and addiction settings.

RCS 6476 Human Sexuality Counseling

Course is designed to introduce students & mental health professionals to the diverse nature and construct of human sexuality. The curriculum meets the Florida Statute 491 licensure requirement as a contact area in "human sexuality theories".

MHS 6210 Assessment in Marital and Family Therapy

Examines assessment procedures and instruments utilized in Marriage and Family Therapy settings. Critical issues in diagnosing, testing, and evaluation of individual's mental health and the family systems in which they are a part.

MHS 6438 Family Therapy Theories and Techniques

This course covers the theory and application of intervention techniques to family systems. Students will develop skills in interviewing, assessing, treatment planning, therapeutic interventions, observing family interactions, and developing basic aspects of treating families.

MHS 6432 Marital Therapy Theories and Techniques

This course focuses on (a) marital and other adult romantic relationships, and (b) how marriage and couples counseling can assist individuals dealing with romantic relationship problems and difficulties. Evidence-based treatments will be addressed.

MHS 6110 Contemporary and Community issues in MFT

This course facilitates students developing competencies in emerging and evolving contemporary issues such as technology, immigration, crisis counseling, military families, as well as the practice of MFT's in various community settings such as private practice, hospitals, schools, residential, and non-profit agency work.

MHS 6100 Medical Family Therapy and Integrated Healthcare

This course will evaluate the medical family therapist role in navigating the unique issues that arise in families dealing with major health challenges. It will facilitate students developing specific clinical strategies for treating families and collaborating with other health professionals in medical settings.

MHS 6462 Trauma Informed Individual, Family, and Couple Treatment

The course will address the various forms of traumatic stressors and the limitation of linear thinking in assessing and treating trauma. The utility of systemic thinking will be discussed and systems-informed practices and protocols will be explored.

MHS 6423 Individual and Family Treatment with Children and Adolescents

This course will focus on how to work with children and adolescents in individual and family therapy. Unique clinical issues associated with this population as well as best practices will be addressed.

RCS 6510 Group Theories and Practice

Theoretical and empirical issues in group counseling are examined in the context of an ongoing group. Emphasis is on application to rehabilitation and mental health counseling.

MHS 6971 Marriage and Family Therapy Thesis

The Master's Thesis for the MS in Marriage and Family Therapy is a research project designed to result in an original research product.

MHS 6947 Marriage and Family Therapy Practicum I-IV

Fieldwork experience in a marriage and family therapy setting repeated over four semesters. At the conclusion of the four semesters, a minimum of 500 clinical hours of face-to-face contact must be accrued. An additional semester may be taken, if the student is still short of the 500 clinical hours.

- 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 proposed program will be seeking accreditation from COAMFTE after the first cohort of students graduate. Data collected from the first cohort of students will be used in the self-study that needs to be submitted prior to the site visit. The accreditation process, once started, takes approximately 2 years to complete. The expectation is that by year 3 of the proposed program, we will have completed the self-study and by year 4 we will have completed the site visit and received accreditation.

- 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 anticipated delivery system for the proposed program will be a traditional on campus delivery mode. We have reached out to the public and private universities within Florida who offer an MFT master's degree (see table in Section II. C.) seeking opportunities for collaboration around research and guest speakers. We have heard back from two universities (UF and NOVA) interested in collaborating on research with the proposed program faculty.

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).

The proposed program will have three core faculty members (Dr. Henry, Dr. Baxley, and a new hire) and three affiliated faculty members from the RMHC program teaching through year 5. Only the three-core faculty will teach field placement courses and act as advisors for students in the proposed program. Two of the core faculty (Dr. Henry and Dr. Baxley) will be on 12-month clinical instructor lines and a 100% of their FTE will be dedicated to the new program. Dr. Henry will be responsible for directing the new program and Dr. Baxley will be coordinating field placement in addition to their teaching and advising. The other core faculty will be on a 9-month tenure earning line and a 100% of their FTE will be dedicated to the new program. They will coordinate the thesis option, conduct research, and teach two classes each fall and spring.

Full-time faculty who will teach in the MFT program as found in Appendix A, Table 4:

- Tammy Jorgensen Smith, PhD, Associate Professor in RMHC
- Vicky Buckles, PhD, MCAP, Clinical Instructor in RMHC
- Michael Dow, PhD, Full Professor in MHLF
- Ryan Henry, PhD, LMFT, Director of the Marriage and Family Therapy Program, Clinical Instructor
- Lauren Baxley, PhD, LMFT, Field Placement Coordinator, Clinical Instructor
- New hire, PhD, LMFT, Assistant/ Associate Professor

- 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 new program's cost effectiveness is based on sharing 7 existing courses with the RMHC program. The caps on these courses is high enough that new sections of the course will not need to be added for 6 of the 7 shared courses. This will create a cost-effective method for delivering the new program. The data in Table 2 does not reflect that students in the new program are filling empty seats of preexisting courses at no additional cost. The salaries and benefits of affiliated faculty members, proportion to their respective effort, will be reallocated from RMHC to the proposed program. The proposed program will also utilize two adjunct faculty each year reallocated from the college budget. In addition, there will be three core faculty dedicating 100% of their FTE to the new program. These funds will be reallocated from the existing college budget.

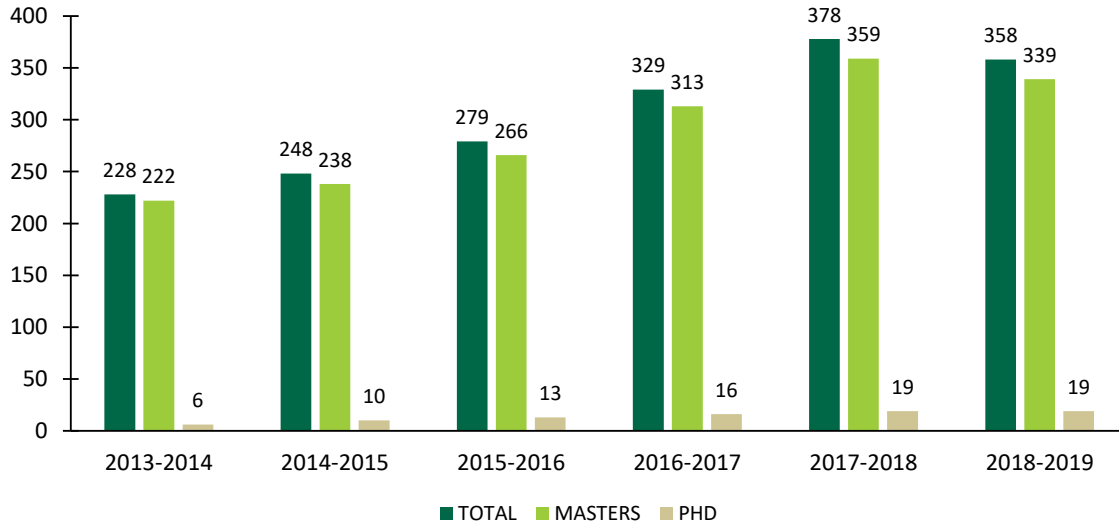
- C. Provide in the appendices the abbreviated curriculum vitae (CV) for each existing faculty member (do not include information for visiting or adjunct faculty).**

CV's are included as Appendix D.

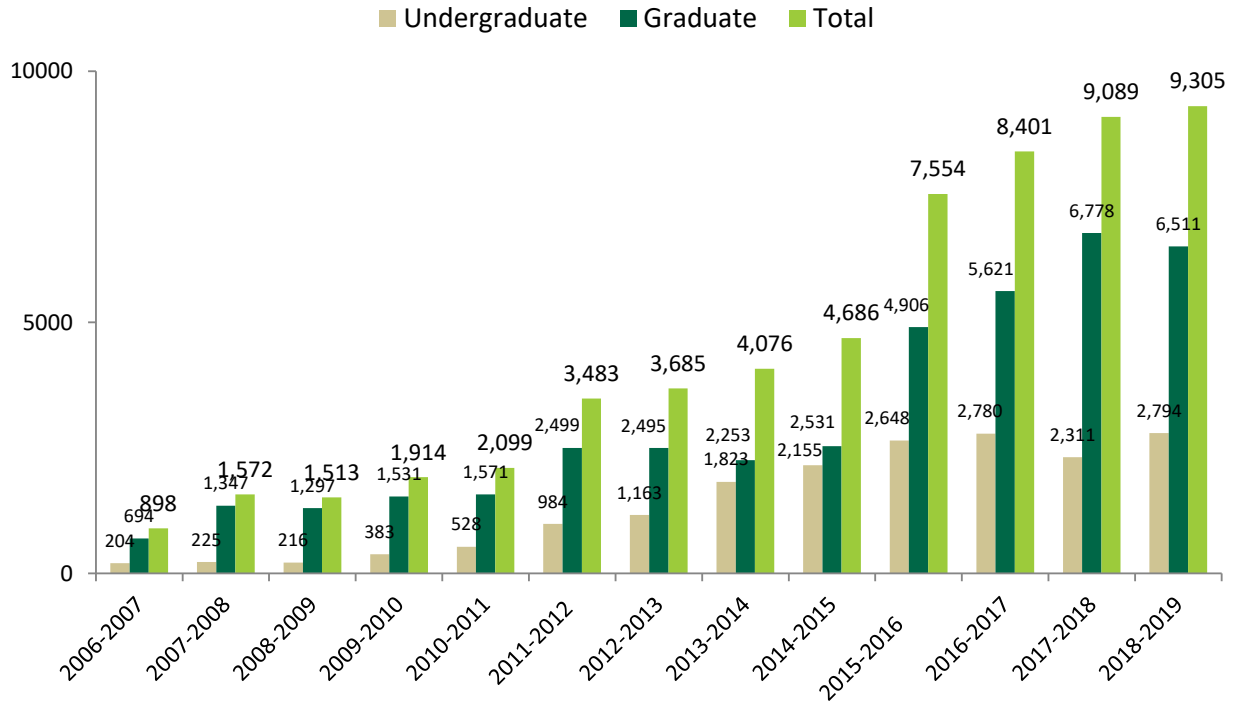
- D. Provide evidence that the academic unit(s) associated with this new degree have been productive in teaching, research, and service. Such evidence may include trends over time for average course load, FTE productivity, student HC in major or service courses, degrees granted, external funding attracted,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

The proposed program will be associated with the Department of Child and Family Studies (CFS) within the College of Behavioral and Community Sciences. At the graduate level, the Department currently offers three master's programs (Applied Behavior Analysis; Child and Adolescent Behavioral Health; and Rehabilitation and Mental Health Counseling) and one Ph.D. program (Applied Behavior Analysis). At the undergraduate level, there is one minor in Applied Behavioral Analysis. The new program will add to the positive trend in CFS headcount and SCH over the last few years.

ANNUAL UNDUPLICATED STUDENT HEADCOUNT CFS ACADEMIC PROGRAMS



GROSS STUDENT CREDIT HOURS (SCH) CFS 13 YEAR TREND



The Department of Child and Family Studies has been very productive in research with 4 books, 21 book chapters, 89 peer reviewed journal articles, 35 technical reports, and 255 presentations in 2018. CFS successfully secured new and continuing federal and non-federal awards totaling \$26,562,123 in 2018 and manages a portfolio of contracts and grants totaling \$45.2 million.

In terms of service to the profession, CFS had 17 faculty who serve on editorial board positions for 36 journals and 12 faculty served as journal reviewers for 35 journals.

USF's Rehabilitation and Mental Health Counseling program is ranked 27th among all institutions by *US News and World Report*.

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.**

Part I -Overview of USF Libraries, Mission, and Program/Discipline Strengths

The University of South Florida (USF) is accredited by the Southern Association of Colleges and Schools' Commission on Colleges to award associate, baccalaureate, master's, specialist, and doctorate degrees. 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 and the Hinks and Elaine Shimberg Health Sciences Library, both located on the Tampa Campus; the Nelson Poynter Memorial Library, USF St. Petersburg Campus; and an Information Commons at the USF Sarasota-Manatee campus.

The USF Libraries inspire research, creativity, and learning by connecting the USF community to relevant and high-quality information. Our vision is to become the center of a highly engaged university community, driven to produce high-impact research and to nourish creativity. Together, the USF Libraries provide access to more than 2 million volumes and an extensive collection of electronic resources including approximately 64,928 e-journal subscriptions and over 900 aggregator databases containing another 92,855 unique e-journal titles, 693,313 e-books, and 826,000 digital images. In addition, students have access to over 83,000 audio/visual materials including electronic media, music scores, audiobooks, CDs, and DVDs.

The USF Libraries endeavor to maintain a research collection that satisfies the resource needs of the proposed graduate curriculum in the Master of Science in Marriage and Family Therapy.

Part II -USF Libraries' Collections

MONOGRAPHS

The USF Library contains extensive holdings of books in both print and e-book format that support student and faculty instructional and research needs in the new program. To identify the scope of books, titles were derived from searching the library's catalog by Library of Congress Subject Headings relevant to the proposed master's degree curriculum.

MONOGRAPHIC COUNTS			
Subject Headings	Representative Library of Congress Call Numbers	Number of Books	Number of EBooks
Social sciences: Family, marriage, women	HQ1-2044	701	197
Social and public welfare for individuals	HV697-4630	1,395	1,145
Juvenile and adult criminal offenders	HV9051-9430.7	338	215
Civil law-domestic relations	K670-709	241	339
Criminal law-juvenile crime law	K5575-5582	100	90
Family Law-marriage, parent, child, guardian	K155-7197	496	544
Personal health and hygiene	RA773-788	118	110
Mental health and illness prevention	RA790	332	218
Psychiatry	RC435-571	2,341	1,047
Internal Medicine: Therapeutics	RC475-489	51	301
Psychotherapy	RC490-499	2,375	1,001
Personality disorders. Behavioral problems	RC554-569	108	263

Books and E-books in the Library Catalog:

- Books - 8,596
- E-books - 5,470

General E-book Collections:

- Cambridge Books Online
- Oxford Scholarship Online and University Press Scholarship Online
- ProQuest Ebook Central
- PsycBOOKS
- Science Direct
- Springer eBook Collection in Behavioral Sciences
- Taylor & Francis eBooks
- Wiley Online Library

MAJOR SERIAL TITLES (JOURNALS)

The USF Libraries subscribe to several scholarly and professional journals that have an editorial scope and content which support research activities at the master's level in Marriage & Family Therapy. A majority of the titles are in electronic format thereby enhancing accessibility. Journal titles were derived by searching the library's online catalog and identifying titles possessing relevant Library of Congress Subject Headings (LCSH) to research and curriculum topics in Marriage and Family Therapy.

Serial Title Subscriptions

- 43 Journal Titles (electronic format)

MAJOR SERIAL TITLES	
Journal Title	Library Holdings
American Journal of Family Therapy	Taylor & Francis Social Science and Humanities Library 01/01/1997 - present
American Journal of Psychotherapy	Academic Search Premier 01/01/1975 - 10/01/2016
Annals of Behavioural Science	Springer Nature Journals 01/01/1995 - present
Annals of Family Medicine	Academic Search Premier 09/01/2003 - present
Behavior Therapy	ScienceDirect Freedom Collection 12/01/1994 - present
Behavioral and Cognitive Psychotherapy	Cambridge Journals Online 01/01/1998 - present
Behaviour Research and Therapy	ScienceDirect Freedom Collection 01/01/1995 - present
Child and Family Behavior Therapy	Taylor & Francis Social Science and Humanities Library 01/01/1997 - present
Clinical Child and Family Psychology Review	Springer Nature Journals 01/01/1998 - present
Cognitive Therapy and Research	Springer Nature Journals 01/01/1977 - present
Contemporary Family Therapy	Springer Nature Journals 01/01/1979 - present
Counselling and Psychotherapy Research	Wiley Online Library 01/01/2001 - present
Families, Systems & Health	PsycARTICLES (EBSCO) 01/01/1983 - present
Family Journal	SAGE Premier All Access Collection 01/01/1999 - present
Family Medicine	EBSCO Open Access Journals 01/01/2000 - present
Family Process	Wiley Online Library 01/01/1962 - present
Family Science Review	EBSCO Open Access Journals 01/01/1987 - present
Family Therapy	ProQuest Periodicals Archive Online 07/01/1972 - 12/31/1972, 01/01/1974 - 12/31/1987, 01/01/1989 - 01/01/2005
International Journal of Group Psychotherapy	Taylor & Francis Social Science and Humanities Library 01/01/1997 - present
Journal of Addictive Behaviors	PubMed Central (PMC) 01/01/2013 - present
Journal of Autism and Developmental Disorders	Springer Nature Journals 01/01/1971 - present
Journal of Behavior Therapy and Experimental Psychiatry	ScienceDirect 03/01/1970 - present
Journal of Child and Family Studies	Springer Nature Journals 01/01/1992 - present
Journal of Cognitive Behavioral Psychotherapy and Research	DOAJ: Directory of Open Access Journals 01/01/2012 - present
Journal of Family Issues	SAGE Premier All Access Collection 01/01/1999 - present
Journal of Family Psychotherapy	Taylor & Francis Social Science and Humanities Library 01/01/1997 - present
Journal of Family Social Work	Taylor & Francis Social Science and Humanities Library 01/01/1997 - present

MAJOR SERIAL TITLES	
Journal Title	Library Holdings
Journal of Family Therapy	Wiley Online Library 01/01/1997 - present
Journal of Family Violence	Springer Nature Journals 01/01/1986 - present
Journal of Feminist Family Therapy	Taylor & Francis Social Science and Humanities Library 01/01/1997 - present
Journal of Infant, Child, and Adolescent Psychotherapy	Taylor & Francis Social Science and Humanities Library 01/01/2000 - present
Journal of LGBT Issues in Counseling	Taylor & Francis Social Science and Humanities Library 01/01/2006 - present
Journal of Marital and Family Therapy	Wiley Online Library 01/01/1975 - present
Journal of Marriage and Family	Wiley Online Library 01/01/2000 - present
Journal of Sex and Marital Therapy	Taylor & Francis Social Science and Humanities Library 01/01/1997 - present
Journal of the American Medical Association	Journals@Ovid 01/01/1993 - present
Marriage and Family Review	Taylor & Francis Social Science and Humanities Library 01/01/1997 - present
Mental Health in Family Medicine	PubMed Central (PMC) 01/01/2008 - 09/30/2013
Psychotherapy	PsycARTICLES (EBSCO) 01/01/1963 - present
Psychotherapy Research	Taylor & Francis Social Science and Humanities Library 01/01/1991 - present
Sexual and Relationship Therapy	Taylor & Francis Social Science and Humanities Library 01/01/2000 - present
Trauma, Violence & Abuse	SAGE Premier All Access Collection 01/01/2000 - present
Women and Therapy	Taylor & Francis Social Science and Humanities Library 01/01/1997 - present

DATABASES

Scholarly, research, and instructional activities associated with the new master's degree in Marriage & Family Therapy are supported by a number of both specialized and general databases. The databases provide access to journal articles, conference proceedings, theses & dissertations, statistical data, and reports.

- Academic Search Premier
- CINAHL
- JSTOR
- MEDLINE
- ProQuest Social Sciences Premium Collection
- ProQuest Dissertations and Theses, A&I
- PubMed
- PsycINFO (EBSCO)
- Scopus
- Social Work Abstracts
- Web of Science

- 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.**

As of May 3, 2019, the collections of the USF Tampa Library and affiliates are sufficient to support the Master's Program in Marriage and Family Therapy. The Libraries maintain an exceptionally strong collection of resources and services needed to support USF as a Preeminent Research University. The librarians and Dean of the Libraries work closely with the College of Behavioral and Community Sciences to ensure all curricular and research needs are more than adequately supported. No new resources are required to support this new master's program 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.**

The Department of Child and Family Studies has dedicated classrooms that have enough space to accommodate the extra courses needed for the proposed program. Sharing the seven courses between programs makes this possible especially because 6 of those courses will not require any additional sections, which keeps the number of additional class times and rooms manageable within the space we already have. There is one clinical laboratory set up for recording role-plays and therapy sessions that will be shared with the RMHC program. The room is currently used heavily during the fall semester during the day but the evenings are free and during spring and summer, the use is currently very light. Clinical courses using the space will be coordinated to allow both programs access to the space as needed. The School of Social Work, which is also in the College, has an additional clinical laboratory that could be shared if space in the RMHC lab becomes too tight. Currently, all faculty associated with the proposed program already have office space.

- 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 for the new tenured faculty position has been identified. In order to make space we are combining our department computer lab with the college's computer lab. Our computers will be added to the 30 other computers already apart of the college lab. The space freed up by moving the lab will allow room for an additional faculty office.

All classrooms in the college are now "multimedia enabled" with (at a minimum) a PC, projector, Internet-connectivity, and audio support. We believe that we have adequate and sufficient classroom space and associated equipment to support the attainment of course outcomes and to provide an atmosphere conducive to learning.

- 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.**

No additional capital expenditures will be needed beyond what is being covered currently, and we do not

anticipate any increased costs in non-I&R activities.

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

A clinical lab room with recording capabilities is available and will be used for role-plays and live demonstrations of family and couples therapy. All classrooms have multimedia capabilities in place.

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 other specialized equipment will be needed to implement and sustain the new 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.

No other specialized resources are needed to implement 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.

There are no student fellowships or scholarships associated with the proposed program. However, external fellowships are available through the American Association of Marriage and Family Therapy (AAMFT) Minority Fellowship Program. Students interested in research assistantships will have access to not only the faculty in the new proposed program but also to the faculty within the Department of Child and Family Studies. These research assistantships will be dependent on grant funding.

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.

Students will be required to obtain 500 hours of direct client services during their (4) semesters of practicum. Currently we have a list of sites our MFT graduate certificate students are using to complete their family and couple hours. One of the new faculty positions being hired for the proposed program will be responsible for field placement and establishing new sites. We will be pursuing the VA and other hospital settings in connection with our focus on medical family therapy and integrated care. The RMHC program has over 100 affiliated field placement sites. We will start by reviewing their list and identifying the sites that provide family services. Second, we will start reaching out to community partners and state organizations to identify new sites that would be a good fit for providing relational hours. Below is a list of sites already being utilized to provide students with family and couple therapy hours:

- Children's Home Society
- The Life Center
- Kids First
- Gracepoint
- Gulf Coast Jewish Family Services
- Metropolitan Ministries
- Eagle's Wings Counseling Center
- Directions for living
- Christian Counseling of South Tampa
- KDM group
- Center for Discovery
- Tranquil Shores

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	12	15	24	30	24	30	28	35	36	45
Individuals who graduated from preceding degree programs at other Florida public universities	4	5	8	10	8	10	12	15	12	15
Individuals who graduated from preceding degree programs at non-public Florida institutions	0	0	0	0	0	0	0	0	0	0
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	16	20	32	40	32	40	40	50	48	60

* 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 columns 1+...+7	Funding Source					Subtotal columns 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
Columns	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Faculty Salaries and Benefits	338,680	0	0	0	0	0	0	\$338,680	366,595	0	0	0	0	0	\$366,595
A & P Salaries and Benefits	21,937	0	0	0	0	0	0	\$21,937	23,743	0	0	0	0	0	\$23,743
USPS Salaries and Benefits	0	0	0	0	0	0	0	\$0	0	0	0	0	0	0	\$0
Other Personal Services	16,000	0	0	0	0	0	0	\$16,000	16,000	0	0	0	0	0	\$16,000
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	11,300	0	0	0	0	0	0	\$11,300	12,000	0	0	0	0	0	\$12,000
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	\$387,917	\$0	\$0	\$0	\$0	\$0	\$0	\$387,917	\$418,338	\$0	\$0	\$0	\$0	\$0	\$418,338

*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)	3.06	3.19
A & P (FTE)	0.25	0.25
USPS (FTE)	0	0

Calculated Cost per Student FTE

	Year 1	Year 5
Total E&G Funding	\$387,917	\$418,338
Annual Student FTE	20	60
E&G Cost per FTE	\$19,396	\$6,972

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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
Rehabilitation Counseling	1,172,267	181,697	\$990,570
College Dean's Office	23,645,741	206,220	\$23,439,521
Totals	\$24,818,008	\$387,917	\$24,430,091

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

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APPENDIX A

**TABLE 4
ANTICIPATED FACULTY PARTICIPATION**

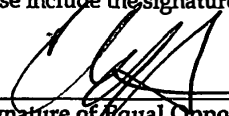
Faculty Code	Faculty Name or "New Hire" Highest Degree Held Academic Discipline or Specialty	Rank	Contract Status	Initial Date for Participation in Program	Mos. Contract Year 1	FTE Year 1	% Effort for Prg. Year 1	PY Year 1	Mos. Contract Year 5	FTE Year 5	% Effort for Prg. Year 5	PY Year 5
A	Tammy Jorgensen Smith, Ph.D. RMHC	Prof. Professor	Tenure	Fall 2020	9	0.75	0.13	0.09	9	0.75	0.13	0.09
A	Vicky Buckles Ph.D. RMHC	Clinical Instructor	MYA	Fall 2020	12	1.00	0.13	0.13	12	1.00	0.25	0.25
A	Michael Dow Ph.D. MHLP	Full Professor Professor	Tenure	Fall 2020	9	0.75	0.13	0.09	9	0.75	0.13	0.09
A	Ryan Henry Ph.D. MFT	Clinical Instructor	MYA	Fall 2020	12	1.00	1.00	1.00	12	1.00	1.00	1.00
A	Lauren Baxley, PhD MFT	Clinical Instructor	MYA	Fall 2020	12	1.00	1.00	1.00	12	1.00	1.00	1.00
B	New Hire, Degree MFT	Asst/Assoc Professor	Tenure	Fall 2020	9	0.75	1.00	0.75	9	0.75	1.00	0.75
Total Person-Years (PY)								3.06				3.19

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	2.31	2.44
B	New faculty to be hired on a vacant line	Current Education & General Revenue	0.75	0.75
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	Year 5
			3.06	3.19

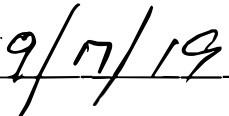
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APPENDIX B

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



Signature of Equal Opportunity Officer
Todd A. Chavez
Digitally signed by Todd A. Chavez
DN: cn=Todd A. Chavez, o=University of South Florida, ou=USF
Library, email=tchavez@usf.edu, c=US
Date: 2019.09.09 09:28:11 -0500



Date
9/9/19

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: EAB Report



Initial Research Update: Graduate Program Opportunities for University of South Florida

Executive Overview

EAB identified the five most promising graduate program opportunities for development within the College of Education and the College of Behavioral and Community Sciences at the University of South Florida (USF). EAB recognizes particular interest at USF in developing interdisciplinary programs at the intersection of the two colleges.

In this analysis, EAB focused on graduate degree programs at the master's and doctoral level, as well as graduate-level certificates. Promising program opportunities were determined based on analysis of current and expected regional workforce demand (defined in the Methodology section below) and the colleges' existing portfolio of academic programs.

Given the comprehensive program portfolios of the College of Education and College of Behavioral and Community Sciences, the top opportunities identified in our initial labor market analysis are already offered by USF. Our primary research focus is identifying emerging program opportunities within the two colleges with emphasis on interdisciplinary offerings. This research update identifies and describes five new opportunities. EAB ranked program opportunities by the level of employer demand, regional competition, and anticipated effort required to launch the program. (See Methodology section for further explanation on program ranking.) Our ongoing analysis will illuminate how to prioritize program development and share takeaways from regional and national trends that are affecting the program fields.

We have provided in the Appendix of this report labor market data where existing programs within the two colleges align to employer demand. These programs may prove worthy subjects for discussion of how to revise or reposition programs to strengthen enrollments.

Methodology

EAB analyzed and identified program opportunities for potential degree and certificate programs based on the following indicators:

Employer Demand: Unless stated otherwise, this report includes data from online job postings from February 1, 2016 to January 31, 2016 through the Burning Glass Labor/Insight™ tool. EAB identified the top regional occupations and skills for professionals who possess graduate-level degree. To rank programs by employer demand EAB created the following rankings:

- 'Low' employer demand represents fewer than 500 relevant job postings within the last year,
- 'Moderate' employer demand represents between 500 and 3,000 job postings,
- 'High' employer demand represents greater than 3,000 job postings.

Historic annual growth in job postings is measured in the change between July 2013 and December 2016, as Burning Glass Labor/Insight™ recognizes more positions starting in July 2013 due to improved data-mining software processes.

Projected Employment Growth: EAB analyzed data from the Bureau of Labor Statistics (BLS) Occupational Outlook Handbook to identify trends in growth of top occupations related to potential degree programs.

Competitive Landscape: The EAB research team identified regional competition, through the National Center on Education Statistics' (NCES) degree completion data from the 2014-2015 academic year, to begin to understand the market supply for professionals qualified to fill employer-demanded positions. To rank programs by in-state competition EAB created the following rankings:

- 'Low' in-state competition represents fewer than 100 relevant degree completions in the 2014-2015 academic year,
- 'Moderate' in-state competition represents between 100 and 500 relevant degree completions,
- 'High' in-state competition represents more than 500 relevant degree completions.

Effort Required to Launch Program: EAB used previous research and existing coursework offered at USF to identify effort to launch proposed programs. Unlike the previous rankings, the research team used qualitative data (e.g., existing coursework in the two colleges of focus) to identify difficulty to launch. Programs ranked as 'low' effort are those that would not require significant investment for USF to develop, such as those programs which can be created by repackaging existing programs. Conversely, programs ranked as 'high' effort are those that will require some initial investment, such as additional coursework or new faculty hires.

Definitions

"Region" and "regional data" refer to Florida, Georgia, Illinois, North Carolina, Texas, and Virginia. EAB defined this region based on USF career services data indicating the most common destinations of University graduates.

Program Opportunity Rankings for the College of Education and the College of Behavior and Community Science

Burning Glass Labor/Insight™, National Center for Education Statistics

Program Opportunity	Host College	Employer Demand	Regional Competition	Effort Required to Launch Program
MA Exceptional Student Education, concentration in Early Childhood/Preschool Education	Education	Low	Low	Low
Online Master's in Higher Education Administration	Education	High	Moderate	Moderate
Master of Social Work, concentration in Mental Health Counseling	Behavioral and Community Sciences	High	Moderate	Low
Master of Arts in Marriage and Family Counseling	Behavioral and Community Sciences	Moderate	Moderate	Moderate
Master of Social Work, concentration in School Counseling	Both	Moderate	Moderate	Low

*The National Center for Education Statistics does not report degree completions for concentrations within master's degree programs. This number represents the total number of master's-level social work degree completions in Florida.

Program Opportunities

Focus Program Creation on the Fields of Social Work, Counseling, and Early Childhood Special Education

Based on trends in market demand and projected growth, EAB recommends USF develop the programs described below.

College of Education

The existing program portfolio at USF's College of Education covers a comprehensive set of general, level-specific, and subject-specific teaching programs. Subject-specific occupations with growing employer demand (like Forestry and Conservation Science Teachers) have limited total demand. Therefore, EAB does not recommend creating any new subject-specific teaching programs.

Surprisingly, regional employer demand data suggests a slight decline in historical demand for "Instructional Designers and Technologists" and "Instructional Coordinators." The College of Education currently offers an M.Ed., Ed.S., Ph.D., and five graduate certificate programs in Instructional Technology, with no readily apparent gaps in the student market served. EAB therefore did not recommend expanding the college's instructional design portfolio, despite seven percent projected employment growth of Instructional Coordinators from 2014 to 2024, classified as average by the BLS.

Described below are the two most promising program opportunities for immediate development within the College of Education:

1. MA Exceptional Student Education, Concentration in Early Childhood/Preschool Education

Both 'Special Education Teacher' and 'Early Childhood Teacher' appear among the top education-related titles in demand. The BLS indicates that among special education teaching occupations, employment will grow fastest at the preschool level. Employer demand data reveals that regional employers displayed a 54 percent increase in demand for preschool-level special educators across the last three years. Although the College of Education currently offers master's degrees in Early Childhood Education, the Early Childhood Education curriculum lacks coursework in special education topics such as learning disabilities, behavior disorders, and assistive technologies for students with disabilities. Because the College currently offers these courses through the Exceptional Student Education program, the proposed concentration program presents a low-investment opportunity for USF to prepare students for a rapidly growing regional job market. Regional employers posted 162 job openings in the last 12 months relevant to graduates of this program, with growth of 54 percent in the last three years.

2. Online Master's in Higher Education Administration

Regional employers posted over 5,000 jobs in the last 12 months for 'Education Administrators, Postsecondary.' While USF offers a PhD program in Higher Education Administration, the high employer demand indicates an opportunity for the University to enter a likely unsaturated program market at the master's level. Only five in-state institutions offer competitor programs. Although there has been a slight decline in regional employer demand for higher education administrators over the past two years, increasing in-state degree completions in this area and high employer demand indicate that an online Master's in Higher Education Administration at USF would attract strong enrollment.

College of Behavioral and Community Sciences

Within the College of Behavioral and Community Sciences, strongest employer demand emerged for social work and counseling occupations, such as "Social Workers, All Other" and "Mental Health Counselors." USF's Master of Social Work programs cover a wide range of student audiences and program formats. EAB recommends the following programs for development in the near term.

3. Master of Social Work, Concentration in Mental Health Counseling

The BLS notes that the increase in people seeking treatment for mental health and substance abuse, including drug offenders sent to treatment programs instead of being sent to jail, drives employment growth in mental health social work. EAB identified an opportunity to better prepare students to become Mental Health and Substance Abuse Social Workers. EAB recommends that USF expand its portfolio of social work and counseling programs to include a concentration program that combines the fields of social work and counseling to prepare students for their growing intersection.

Master of Arts in Marriage and Family Counseling

Greater than 100 percent regional employer demand growth and faster-than-average projected employment growth for marriage and family therapists indicate strong opportunity for USF to serve students seeking to enter this fast-growing field. The College of Behavioral and Community Sciences offers a certificate program in marriage and family counseling. However, this program only targets professional counselors looking to expand their education and does not serve individuals wanting to enter the field of marriage and family counseling. EAB therefore recommends development of a Masters of Arts in Marriage and Family.

Both Colleges

4. Master of Social Work, concentration in School Counseling

Regional employers posted over 800 job postings for family, child, and school social workers in the last 12 months. The BLS finds that rising K-12 school enrollments are driving growth in demand for K-12 school counselors, although constrained state and federal budgets restrict the number of counselors that schools can hire.¹ Further, the prevalence of untreated mental health issues in school children is driving higher demand for school social workers.² Creating a specialization in school counseling within the existing Master of Social Work program will prepare MSW graduates with the school counseling skills the job market demands.

Questions for Discussion

- What are potential risks and opportunities with regards to developing the programs EAB has identified?
- Is there reason to expand or contract the definition of the labor market region?
- To what extent are graduates from current programs meeting employer demand?
- What new or existing topics could be structured into a graduate certificate with limited resource investment?

1) Bureau of Labor Statistics, Occupational Outlook Handbook <https://www.bls.gov/roh/community-and-social-service/school-and-career-counselors.htm#tab-6>
2) School Social Work Association of America <https://www.sswa.org/7699>

Program Opportunity Data for USF

Burning Glass Labor/Insight™, Bureau of Labor Statistics, National Center for Education Statistics

EAB ordered proposed program opportunities by regional job postings in the last year.

Program Opportunity	Regional Job Postings in Last 12 Months	Regional Job Posting Growth 2014-2016	In-State Degree Completions, 2014-2015	Top Occupation for Program Graduates	Projected Growth of Top Occupation, 2014-2024
Master's in Higher Education Administration	5,041	-10%	133	Education Administrators, Postsecondary	8.7%
Master of Social Work, concentration in Mental Health Counseling	3,179	87%	1,091*	Mental Health and Substance Abuse Social Workers	18.9%
Master of Arts in Marriage and Family Counseling	1,219	117%	104	Marriage and Family Therapists	14.8%
Master of Social Work, concentration in School Counseling	829	11%	1,091*	Child, Family, and School Social Workers	6.2%
MA Exceptional Student Education, Concentration in Early Childhood Education	162	54%	20	Special Education Teachers, Preschool	9.0%

*The National Center for Education Statistics does not report degree completions for concentrations within master's degree programs. This number represents the total number of master's-level social work degree completions in Florida, which is a significantly higher number. USF reported 63 master's-level social work degree completions in 2015.

Resource Investment Needed for Proposed Programs

Three of five recommended new programs require only repackaging of existing content within the College of Education and the College of Behavioral and Community Sciences. The two remaining programs also expand upon existing program offerings within the colleges.

Preliminary Resource Investment Summary for USF Program Development

Burning Glass Labor/Insight™, Bureau of Labor Statistics, National Center for Education Statistics

Program Opportunity	Relevant Programs that Exists at USF	Additional Development Required
Online Master's in Higher Education Administration	PhD Higher Education Administration	<ul style="list-style-type: none"> • Repackaging to combine curricular components of existing programs • Minimal content development • Transition to online course structure
Master of Arts in Marriage and Family Counseling	Graduate certificate in Marriage and Family Therapy	<ul style="list-style-type: none"> • Minimal content development • Additional clinical practicum opportunities
Master of Social Work, concentration in Mental Health Counseling	<ul style="list-style-type: none"> • Master of Social Work • MA Rehabilitation and Mental Health Counseling 	Repackaging to combine curricular components of existing programs
MA Exceptional Student Education, concentration in Early Childhood/Preschool Education	<ul style="list-style-type: none"> • MA Exceptional Student Education • MA Early Childhood Education 	Repackaging to combine curricular components of existing programs
Master of Social Work, concentration in School Counseling	<ul style="list-style-type: none"> • Master of Social Work • Graduate Certificate in School Counseling 	Repackaging to combine curricular components of existing programs

Forthcoming Research Deliverables and Events

EAB will continue in-depth analysis of these program opportunities in ongoing research. Our team will learn more about the unique position and operations of USF in the following research events:

On-Site Visit: The on-site visit will consist of a meeting and presentation with key USF stakeholders and research interviews with USF faculty and staff in a variety of departments such as career services, finance, admissions, and marketing and recruitment. Therein, EAB aims to further understand institutional strengths, preferences, and established processes.

On-site visit date: April 10, 2017

EAB will share further analysis and in-depth research findings in the key deliverables described below:

Interim Update: The interim research update will provide in-depth analysis on a single program opportunity including detailed labor market demand data, the competitor landscape, resource and curriculum requirements, and potential risks to implementation. EAB will receive feedback on this single program analysis from USF and incorporate this guidance to inform the content and structure of the analysis for the remaining programs.

Delivery Date: Mid-to-late April

Final Report: The final report will contain a written synthesis of key findings and recommendations for new programs, employer needs, and the external competitive landscape.

Delivery Date: End of May

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.

Appendix: Employer Demand Met by Existing USF Programs

Employer Demand Currently Fulfilled by Programs at USF

Burning Glass Labor/Insight™, Bureau of Labor Statistics

EAB ordered the tables by the number of regional job postings in the last 12 months.

College of Education

Top Occupation in Demand	Regional Job Postings in Last 12 Months	Regional Job Posting Growth 2014-2016	Projected Growth of Top Occupation, 2014-2024	Relevant Existing USF Program(s)
Teachers and Instructors, All Other, Except Special Education ¹	6,631	5%	6.8%	<ul style="list-style-type: none"> MAT programs, MA programs in education/teaching
Postsecondary Teachers, All Other	4,693	-7%	9.3%	<ul style="list-style-type: none"> Subject-specific MA, MAT, M.Ed., and Ph.D. programs Graduate certificate in College Teaching
Librarians	1,345	-25%	1.9%	none
Instructional Coordinators	1,270	-25%	7.0%	<ul style="list-style-type: none"> M.Ed., Ed.S., Ph.D. Instructional Technology Graduate certificates in instructional technology <ul style="list-style-type: none"> Distance Education Florida Design/Virtual Educator Web Design Instructional Design Multimedia Design
High School Teachers, Except Special and Career/Technical Education	971	-38%	5.8%	<ul style="list-style-type: none"> Subject-specific MA, MAT, M.Ed., and Ph.D. programs
Middle School Teachers, Except Special and Career/Technical Education	836	-14%	5.9%	<ul style="list-style-type: none"> Subject-specific MA, MAT, M.Ed., and Ph.D. programs MAT Middle Grades Mathematics, Middle Grades Science
Preschool Teachers, Except Special Education	468	0%	6.7%	<ul style="list-style-type: none"> MA/M.Ed. Early Childhood Education

¹ Teachers and Instructors, All Other, Except Special Education includes a majority of adjunct faculty and lecturer positions at postsecondary education institutions, but also includes elementary or secondary school substitute teachers.

Top Occupation in Demand	Regional Job Postings in Last 12 Months	Regional Job Posting Growth 2014-2016	Projected Growth of Top Occupation, 2014-2024	Relevant Existing USF Program(s)
Elementary School Teachers, Except Special Education	426	-27%	5.8%	<ul style="list-style-type: none"> Subject-specific MA, MAT, M.Ed., and Ph.D. programs MAT/MA/PhD Elementary Education
Special Education Teachers, All Other	371	63%	7.2%	<ul style="list-style-type: none"> MA Exceptional Student Education MA Autism Spectrum Disorder and Severe Intellectual Disabilities

College of Behavioral and Community Sciences

Top Occupation in Demand	Regional Job Postings in Last 12 Months	Regional Job Posting Growth 2014-2016	Projected Growth of Top Occupation, 2014-2024	Relevant Existing USF Program(s)
Social Workers, All Other	4,891	19%	3.8%	<ul style="list-style-type: none"> Master of Social Work PhD Social Work
Mental Health Counselors	3,442	28%	19.6%	<ul style="list-style-type: none"> MA Rehabilitation and Mental Health Counseling Graduate certificate in Children's Mental Health Graduate certificate in Integrative Mental Health Care
Healthcare Social Workers	1,833	35%	19.3%	Dual Master of Social Work / Master of Public Health
Rehabilitation Counselors	96	110%	9.0%	<ul style="list-style-type: none"> MA Rehabilitation and Mental Health Counseling Graduate certificate in Rehabilitation Technology

Appendix C: Burning Glass Nationwide Data

EMPLOYMENT POTENTIAL

PROJECT CRITERIA

Validate	Programs
Location	Nationwide
Degree Level	Master's degree
Time Period	2/1/2018 - 1/31/2019
Selected Programs	Marriage and Family Therapy/Counseling (51.1505)
Career Outcomes mapped to Selected Programs of Study	Substance Abuse Counselor, Family / Behavioral Therapist

HOW MANY JOBS ARE THERE FOR YOUR GRADUATES?

For your project criteria, there were **18,318** job postings in the last 12 months.

Compared to:

- 29,280,440 total job postings in your selected location
- 2,769,114 total job postings requesting a Master's degree in your selected location

The number of jobs is expected to **grow** over the next 8 years.

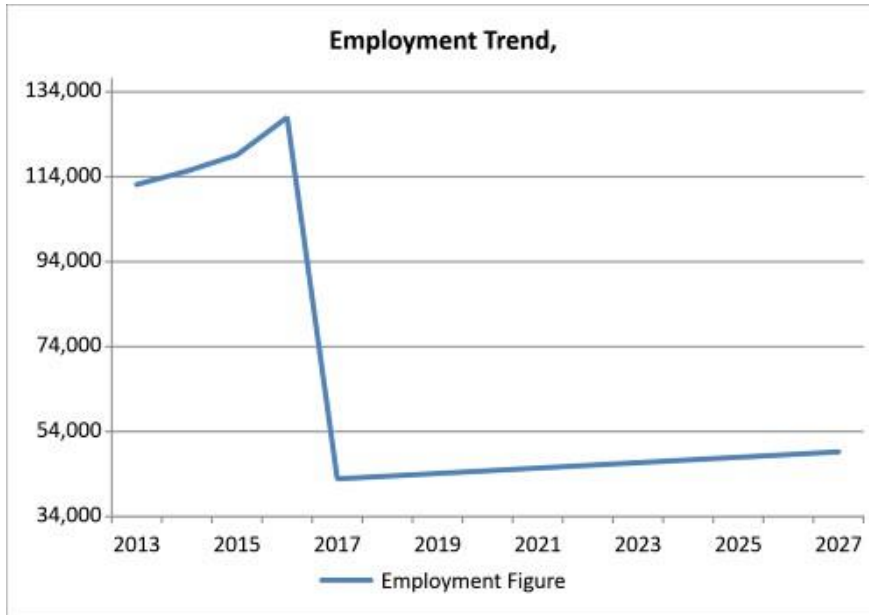
GROWTH BY GEOGRAPHY

Geography	Selected Occupations	Total Labor Market	Relative Growth
Nationwide	14.80%	7.40%	High

HOW HAS EMPLOYMENT CHANGED FOR CAREER OUTCOMES OF YOUR PROGRAM?

	2013	2014	2015	2016	2017	2027
Employment (BLS)	112,180	115,330	119,160	128,000	42,880	49,226

Appendix C: Burning Glass Nationwide Data



Employment data between years 2018 and 2027 are projected figures.

DETAILS BY OCCUPATION

Occupation Group	Postings	LQ	Employment (2017)	Employment Growth (2016 - 2017)	Projected Employment Growth (2018-2027)
Mental Health Therapy	15,989	NA	42,880	16.0%	14.8%
Mental and Behavioral Counseling	2,329	NA	NA	NA	NA

HOW VERSATILE IS MY PROGRAM?

Graduates of this program usually transition into any of the 2 different occupation groups:

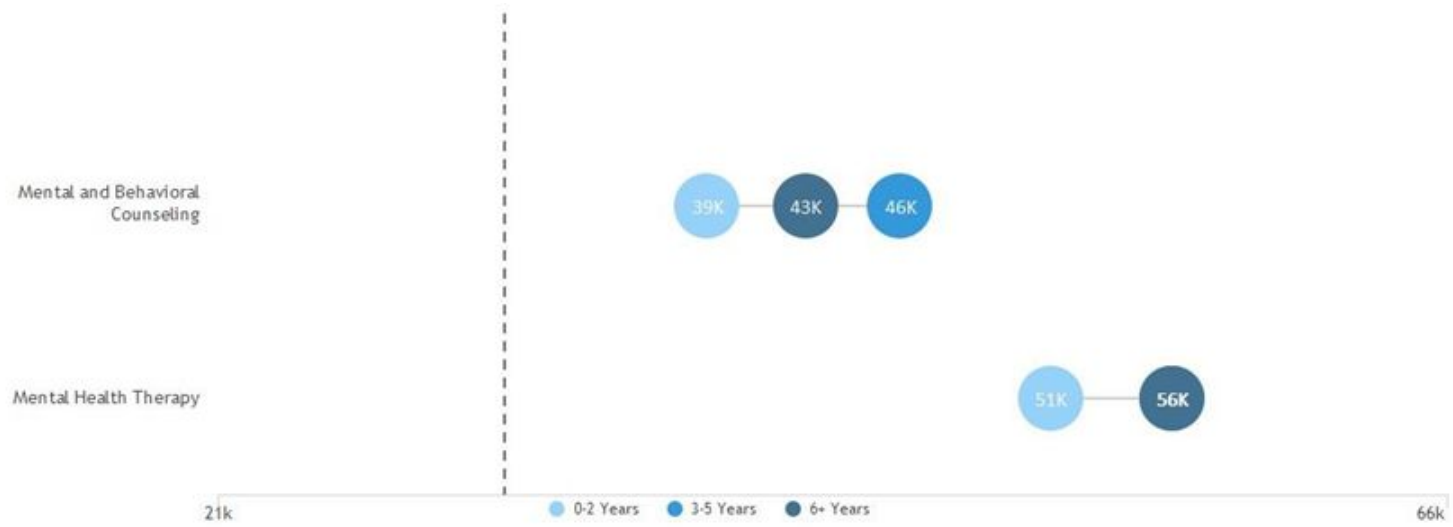
Occupations Group	Market Size (postings)	Percentage of Career Outcome demand
Mental Health Therapy	15,989	87.3%
Mental and Behavioral Counseling	2,329	12.7%

Appendix C: Burning Glass Nationwide Data

WHAT SALARY WILL MY GRADUATES MAKE?

The average salary in the nation for graduates of your program is **\$49,973**. This average salary is **Above** the average living wage for the nation of \$31,450.

Appendix C: Burning Glass Nationwide Data

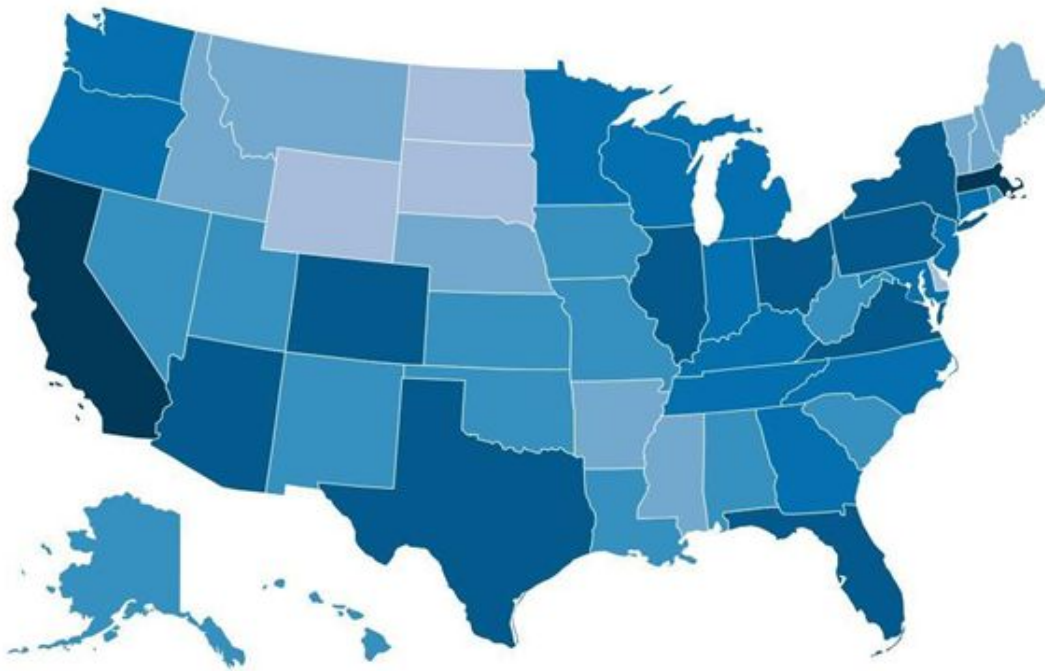


Appendix C: Burning Glass Nationwide Data

Salary numbers are based on Burning Glass models that consider advertised job posting salary, BLS data, and other proprietary and public sources of information.

Occupation Group	25 th Percentile	Average	75 th Percentile
Mental Health Therapy	\$51,490	\$55,926	\$55,958
Mental and Behavioral Counseling	\$38,912	\$45,975	\$42,502

WHERE IS THE DEMAND FOR MY GRADUATES?



TOP LOCATIONS BY POSTING DEMAND

Location	Postings
California	3,702
Massachusetts	1,001
Pennsylvania	858
Arizona	779
Texas	746

Appendix C: Burning Glass Nationwide Data

Florida	692
New York	653
Illinois	591
Colorado	525
Virginia	514

COMPETITIVE LANDSCAPE

PROJECT CRITERIA

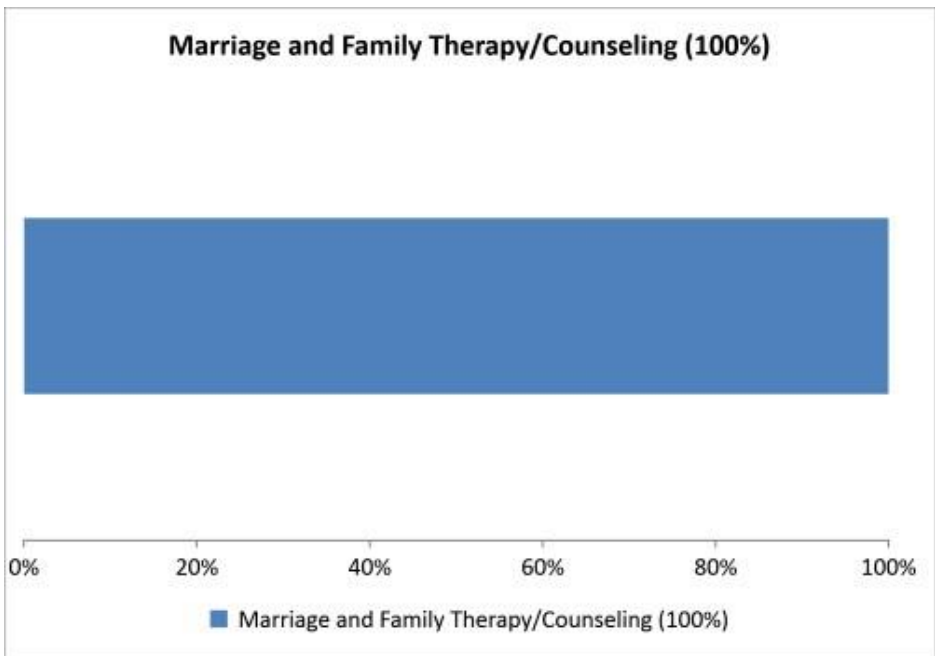
Validate	Programs
Location	Nationwide
Degree Level	Master's degree
Time Period	2/1/2018 - 1/31/2019
Selected Programs	Marriage and Family Therapy/Counseling (51.1505)
Career Outcomes mapped to Selected Programs of Study	Substance Abuse Counselor, Family / Behavioral Therapist

OVERVIEW

	#	% Change (2013-2017)
Degrees Conferred	3,102	-1%
Number of Institutions	148	24%
Average Conferrals by Institution	21	-19.20%
Median Conferrals by Institution	12	-20.00%

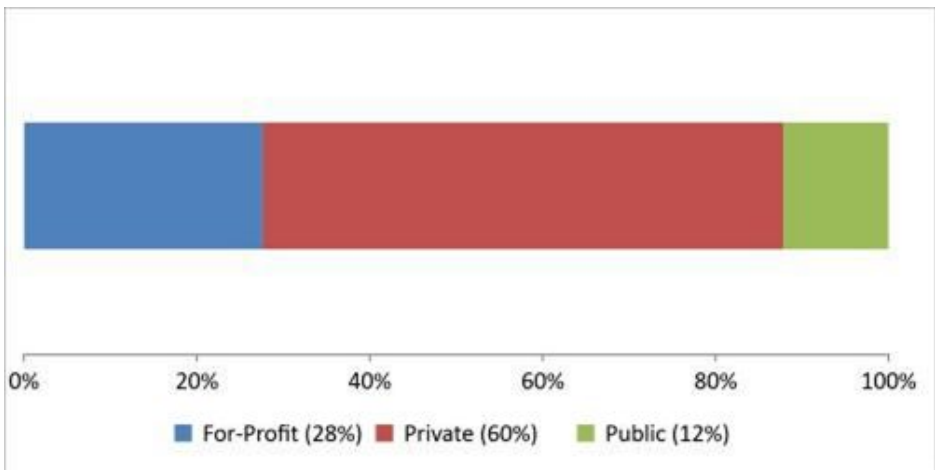
Appendix C: Burning Glass Nationwide Data

MARKET SHARE BY PROGRAM



Program	Conferrals (2017)	Market Share (%)
Marriage and Family Therapy/Counseling	3,102	100.00%

MARKET SHARE BY INSTITUTION TYPE



Appendix C: Burning Glass Nationwide Data

Institution Type	Conferrals (2017)	Market Share (%)
For-Profit	857	27.63%
Private	1,868	60.22%
Public	377	12.15%

TOP 10 INSTITUTIONS

Institution	School Type	Market Share (2017)	Market Share Change	Conferrals (2017)	Conferrals Change (2013-2017)
University of Phoenix-California	For- Profit	9.54%	-3.71%	296	-28.80%
Brandman University	Private	5.35%	-2.83%	166	-35.40%
Capella University	For- Profit	3.97%	0.98%	123	30.90%
Palo Alto University	Private	3.55%	3.55%	110	100.00%
Alliant International University-San Diego	For- Profit	2.97%	1.47%	92	95.70%
Northcentral University	For- Profit	2.87%	2.46%	89	584.60%
Pacific Oaks College	Private	2.80%	1.65%	87	141.70%

Appendix C: Burning Glass Nationwide Data

Saint Mary's University of Minnesota	Private	2.48%	-1.02%	77	-30.00%
Nova Southeastern University	Private	1.84%	0.09%	57	3.60%
Friends University	Private	1.68%	0.15%	52	8.30%

TOP 10 PROGRAMS

Program	Market Share (2017)	Market Share Change	Conferrals (2017)	Conferrals Change (2013-2017)
Marriage and Family Therapy/Counseling	100.00%	0.00%	3,102	-1.20%

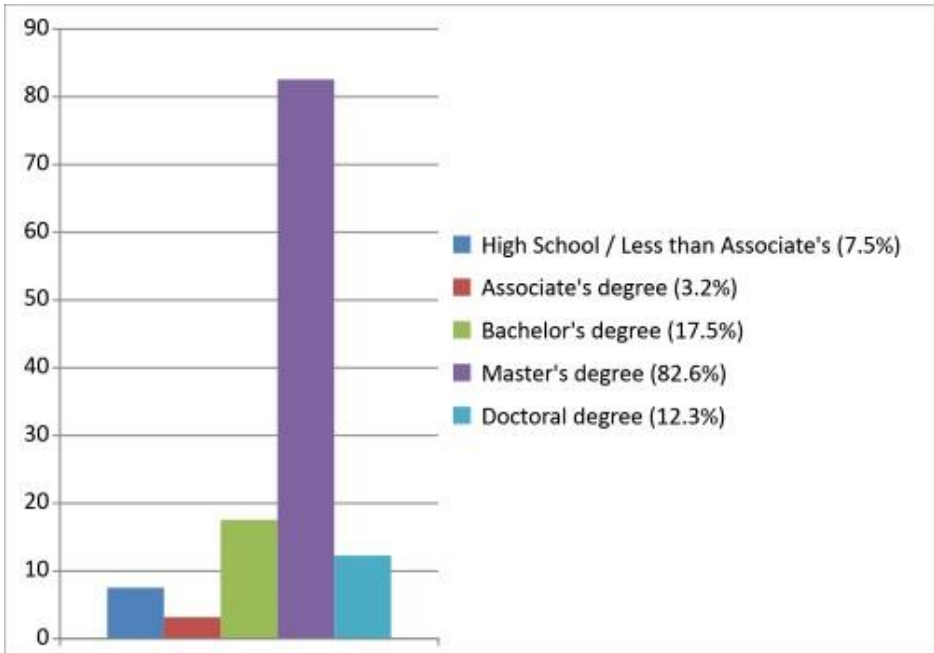
MARKET ALIGNMENT

PROJECT CRITERIA

Explore	Programs
Location	Nationwide
Degree Level	Master's degree
Time Period	2/1/2018 - 1/31/2019
Selected Programs	Marriage and Family Therapy/Counseling (51.1505)
Career Outcomes mapped to Selected Programs of Study	Substance Abuse Counselor, Family / Behavioral Therapist

Appendix C: Burning Glass Nationwide Data

JOB POSTINGS BY ADVERTISED EDUCATION (%)



Appendix C: Burning Glass Florida Data

EMPLOYMENT POTENTIAL

PROJECT CRITERIA

Validate	Programs
States	Florida
Degree Level	Master's degree
Time Period	2/1/2018 - 1/31/2019
Selected Programs	Marriage and Family Therapy/Counseling (51.1505)
Career Outcomes mapped to Selected Programs of Study	Substance Abuse Counselor, Family / Behavioral Therapist

HOW MANY JOBS ARE THERE FOR YOUR GRADUATES?

For your project criteria, there were **718** job postings in the last 12 months.

Compared to:

- 1,517,534 total job postings in your selected location
- 111,272 total job postings requesting a Master's degree in your selected location

The number of jobs is expected to **grow** over the next 8 years.

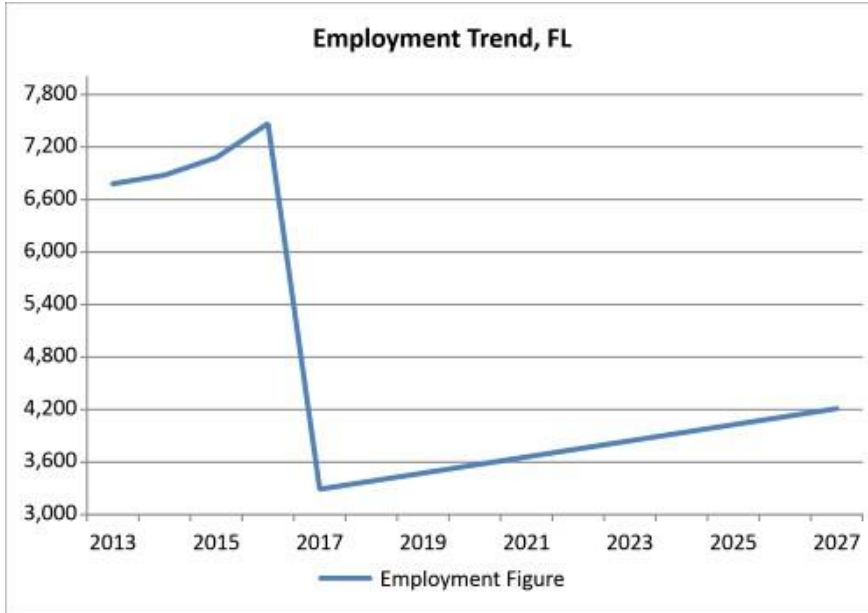
GROWTH BY GEOGRAPHY

Geography	Selected Occupations	Total Labor Market	Relative Growth
Florida	27.99%	15.70%	High
Nationwide	14.80%	7.40%	High

HOW HAS EMPLOYMENT CHANGED FOR CAREER OUTCOMES OF YOUR PROGRAM?

	2013	2014	2015	2016	2017	2027
Employment (BLS)	6,780	6,880	7,080	7,470	3,290	4,211

Appendix C: Burning Glass Florida Data



Employment data between years 2018 and 2027 are projected figures.

DETAILS BY OCCUPATION

Occupation Group	Postings	LQ	Employment (2017)	Employment Growth (2016 - 2017)	Projected Employment Growth (2018-2027)
Mental Health Therapy	615	0.7	3,290	8.6%	28.0%
Mental and Behavioral Counseling	103	0.8	NA	NA	NA

HOW VERSATILE IS MY PROGRAM?

Graduates of this program usually transition into any of the 2 different occupation groups:

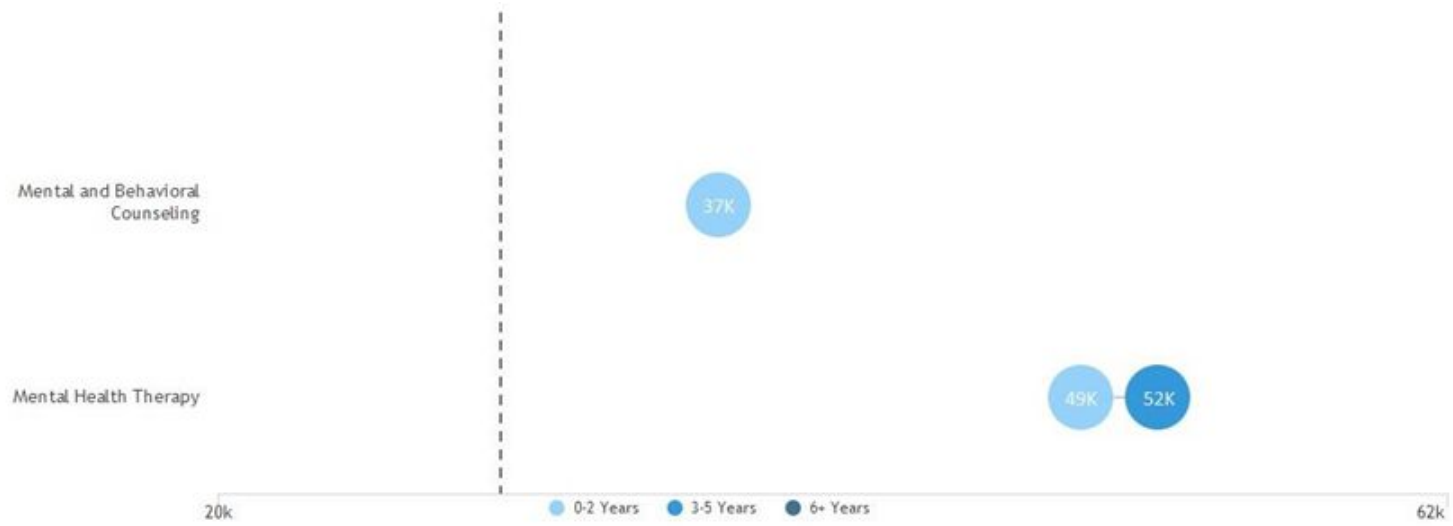
Occupations Group	Market Size (postings)	Percentage of Career Outcome demand
Mental Health Therapy	615	85.7%
Mental and Behavioral Counseling	103	14.3%

WHAT SALARY WILL MY GRADUATES MAKE?

Appendix C: Burning Glass Florida Data

The average salary in Florida for graduates of your program is \$47,661. This average salary is Above the average living wage for Florida of \$29,619.

Appendix C: Burning Glass Florida Data



Appendix C: Burning Glass Florida Data

Salary numbers are based on Burning Glass models that consider advertised job posting salary, BLS data, and other proprietary and public sources of information.

Occupation Group	25 th Percentile	Average	75 th Percentile
Mental Health Therapy	\$49,485	\$52,133	\$0
Mental and Behavioral Counseling	\$37,096	\$0	\$0

COMPETITIVE LANDSCAPE

PROJECT CRITERIA

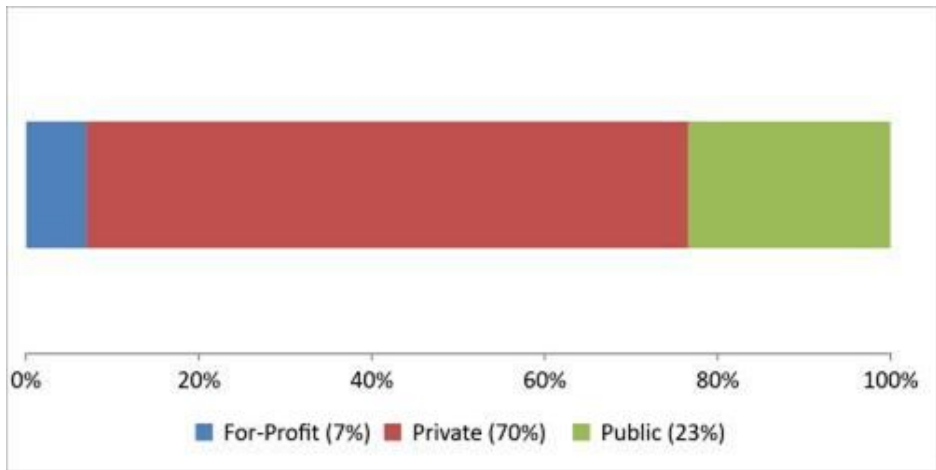
Validate	Programs
States	Florida
Degree Level	Master's degree
Time Period	2/1/2018 - 1/31/2019
Selected Programs	Marriage and Family Therapy/Counseling (51.1505)
Career Outcomes mapped to Selected Programs of Study	Substance Abuse Counselor, Family / Behavioral Therapist

OVERVIEW

	#	% Change (2013-2017)
Degrees Conferred	128	-7%
Number of Institutions	10	11%
Average Conferrals by Institution	13	-13.30%
Median Conferrals by Institution	6	-45.50%

Appendix C: Burning Glass Florida Data

MARKET SHARE BY INSTITUTION TYPE



Institution Type	Conferrals (2017)	Market Share (%)
For-Profit	9	7.03%
Private	89	69.53%
Public	30	23.44%

TOP 10 INSTITUTIONS

Institution	School Type	Market Share (2017)	Market Share Change	Conferrals (2017)	Conferrals Change (2013-2017)
Nova Southeastern University	Private	44.53%	4.67%	57	3.60%
University of Central Florida	Public	17.97%	2.75%	23	9.50%
Palm Beach Atlantic University	Private	12.50%	1.63%	16	6.70%
Stetson University	Private	8.59%	0.62%	11	0.00%

Appendix C: Burning Glass Florida Data

University of Florida	Public	5.47%	-3.23%	7	-41.70%
Argosy University-Tampa	For-Profit	3.91%	-0.44%	5	-16.70%
Argosy University-Sarasota	For-Profit	3.12%	0.22%	4	0.00%
St Thomas University	Private	2.34%	-3.46%	3	-62.50%
University of Miami	Private	1.56%	-2.79%	2	-66.70%
Jacksonville University	Private	0.00%	0.00%	0	0.00%

Appendix C: Burning Glass Tampa Bay Area Data

EMPLOYMENT POTENTIAL

PROJECT CRITERIA

Validate	Programs
Metro Areas (MSAs)	Tampa-St. Petersburg-Clearwater, FL
Degree Level	Master's degree
Time Period	2/1/2018 - 1/31/2019
Selected Programs	Marriage and Family Therapy/Counseling (51.1505)
Career Outcomes mapped to Selected Programs of Study	Substance Abuse Counselor, Family / Behavioral Therapist

HOW MANY JOBS ARE THERE FOR YOUR GRADUATES?

For your project criteria, there were 170 job postings in the last 12 months.

Compared to:

- 331,800 total job postings in your selected location
- 23,696 total job postings requesting a Master's degree in your selected location

The number of jobs is expected to grow over the next 8 years.

GROWTH BY GEOGRAPHY

Geography	Selected Occupations	Total Labor Market	Relative Growth
Tampa, FL	28.00%	15.70%	High
Florida	27.99%	15.70%	High
Nationwide	14.80%	7.40%	High

HOW HAS EMPLOYMENT CHANGED FOR CAREER OUTCOMES OF YOUR PROGRAM?

	2013	2014	2015	2016	2017	2027

Appendix C: Burning Glass Tampa Bay Area Data

Employment (BLS)	820	1,040	1,100	1,190	500	640
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DETAILS BY OCCUPATION

Occupation Group	Postings	LQ	Employment (2017)	Employment Growth (2016 - 2017)	Projected Employment Growth (2018-2027)
Mental Health Therapy	147	1.1	500	28.2%	28.0%
Mental and Behavioral Counseling	23	1.2	NA	NA	NA

WHAT SALARY WILL MY GRADUATES MAKE?

The average salary in Tampa-St. Petersburg-Clearwater, FL for graduates of your program is **\$46,334**. This average salary is **Above** the average living wage for Tampa-St. Petersburg-Clearwater, FL of \$29,141.

Salary numbers are based on Burning Glass models that consider advertised job posting salary, BLS data, and other proprietary and public sources of information.

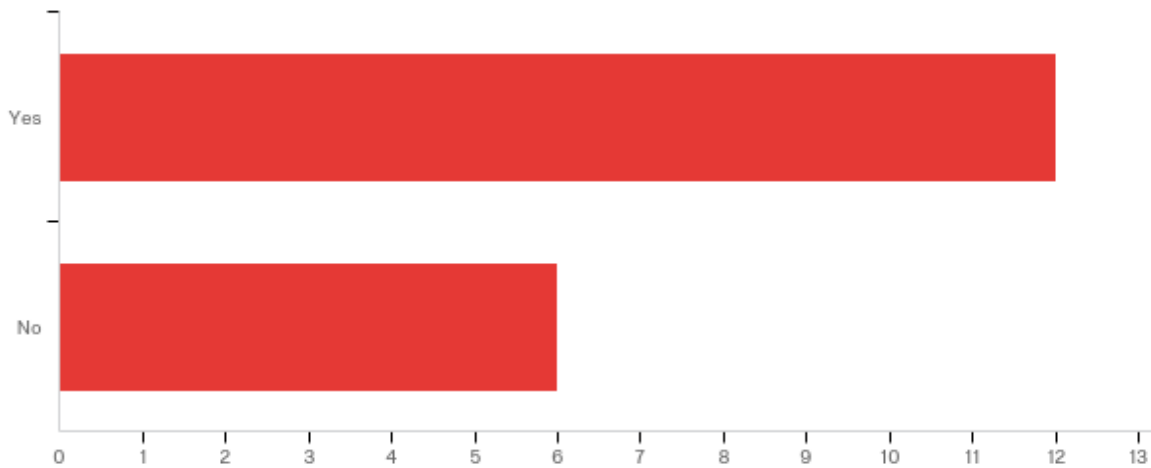
Occupation Group	25 th Percentile	Average	75 th Percentile
Mental Health Therapy	\$50,583	\$0	\$0
Mental and Behavioral Counseling	\$0	\$0	\$0

APPENDIX C: Copies of the Survey Questions and Responses

Survey of Current USF Master’s Students’ Interest in a Marriage and Family Therapy Master’s Program

May 30th 2019, 12:14 pm EDT

Q1 - If at the beginning of your master’s degree you were given the option to do the 15-credit hour MFT graduate certificate or switch to a full 60-credit hour master’s in MFT would you have chosen the full MFT master’s degree?



#	Answer	%	Count
1	Yes	66.67%	12
2	No	33.33%	6
	Total	100%	18

Q2 - If yes, please tell us why you would prefer a 60-credit hour MFT master’s degree over the 15-credit hour certificate that is a part of your Rehabilitation and Mental Health master’s?

This would have meant more coursework directly involving MFT work.

Being that my ultimate goal is to be a LMFT, I would have chosen that one because it would have provided me with a better foundation. However, now I realize that I am more versatile with having the certificate as well as the Master’s.

While it was beneficial to learn about the rehabilitation aspect of mental health I had no interest in the classes which eventually affected my academic performance. A full MFT program would possibly allow me to have more and an elaborate focus on family dynamic and systemic approaches.

APPENDIX C: Copies of the Survey Questions and Responses

This would allow me to focus on honing my skills as an MFT rather than learning about how to be a Voc Rehab counselor.

I am not so interested in the rehab side of the program at all, my main focus is MFT.

15 isn't much knowledge

Q3 - What concentration or courses would you like to see in a 60-credit hour MFT master's degree?

Play/ Child Therapy Systemic Counseling for trauma Addictions in family Therapy

Substance Abuse with Family Therapy A course on in-home family therapy

More than one course on family counseling, couple therapy, systemic approaches

Maybe some specific courses in working with LGBT couples

Family, marriage, sibling rivalry, divorce, engagement, dating, children, family issues, drugs and alcohol, adolescents etc.

I wouldn't know what to ask for

Q4 - If no, please tell us why you would prefer the 15-credit hours MFT certificate over a 60-credit hour master's degree?

Options. Graduating with a degree in RMHC with an MFT certificate gives me access to a wider range of career paths.

I would prefer to be eligible to apply to be both a LMHC and LMFT.

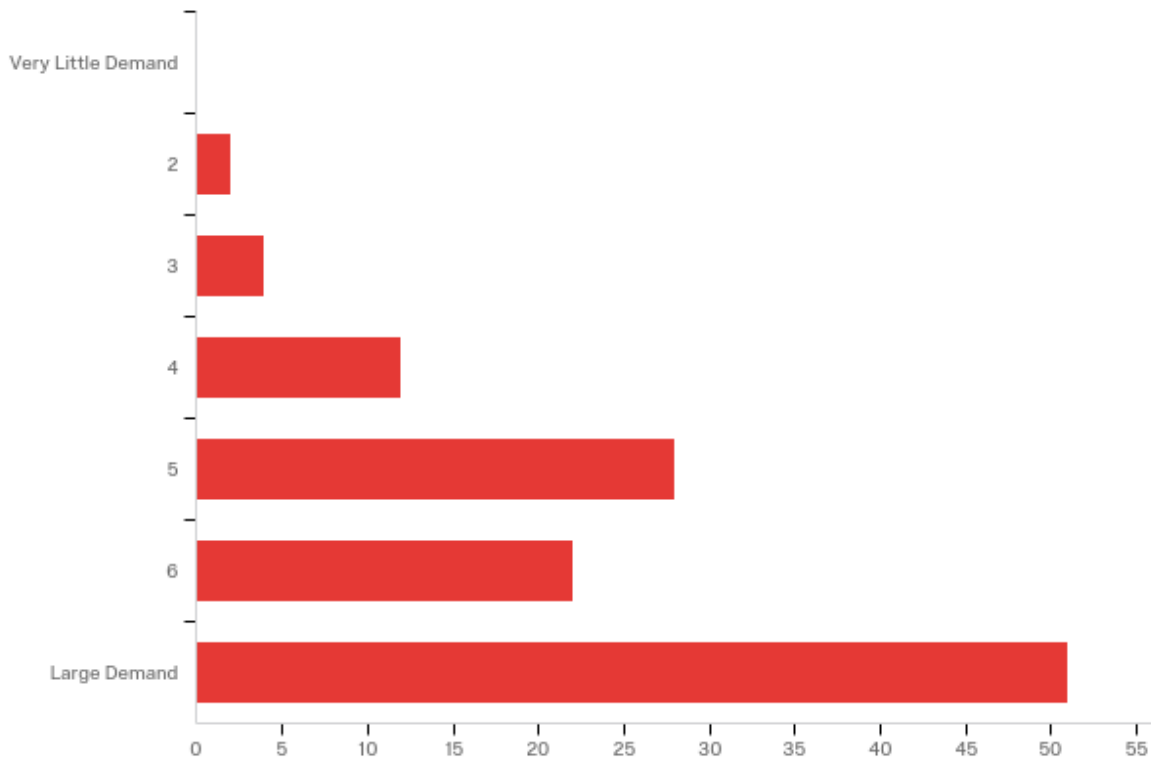
I prefer dual licensure.

I like the idea of dual licensure and with just a Masters in MFT I feel that my practice would be very narrow when I would like to work with individuals and so having both licenses allows me the flexibility in my work as well as a larger clientele base. It's the best of both worlds.

APPENDIX C: Copies of the Survey Questions and Responses

Survey of USF Undergraduate Psychology and Behavioral Healthcare Student's Level of Interest in a Marriage and Family Therapy Master's Program
 May 15th 2019, 11:02 am EDT

Q1 - How much demand do you think there would be for an accredited master's degree in Marriage and Family Therapy at USF?

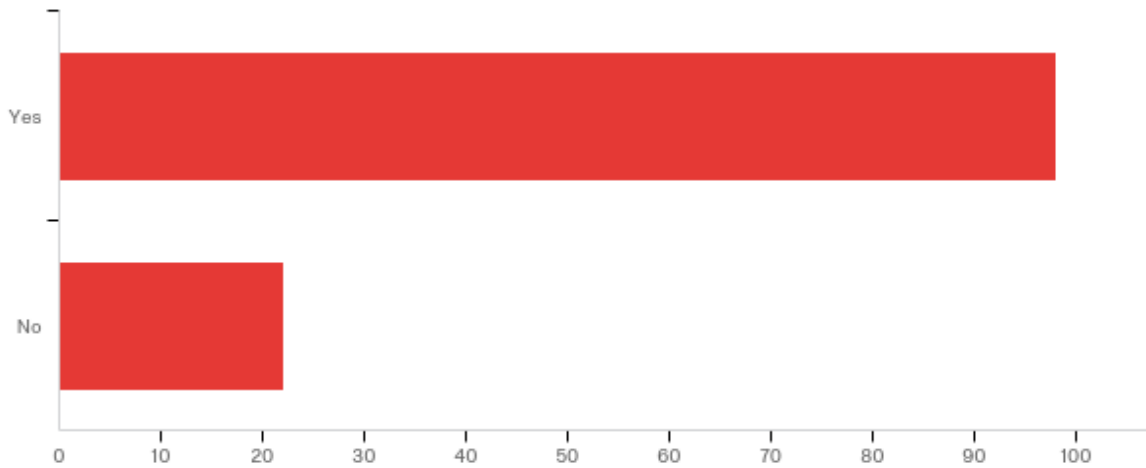


#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	How much demand do you think there would be for accredited master's degree in Marriage and Family Therapy at USF?	2.00	7.00	5.82	1.27	1.61	119

APPENDIX C: Copies of the Survey Questions and Responses

#	Answer	%	Count
1	Very Little Demand	0.00%	0
2	2	1.68%	2
3	3	3.36%	4
4	4	10.08%	12
5	5	23.53%	28
6	6	18.49%	22
7	Large Demand	42.86%	51
	Total	100%	119

Q2 - Are you personally interested in obtaining a Master’s degree in Marriage and Family Therapy?



APPENDIX C: Copies of the Survey Questions and Responses

#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Are you personally interested in obtaining a Master's degree in Marriage and Family Therapy?	1.00	2.00	1.18	0.39	0.15	120
#	Answer					%	Count
1	Yes					81.67%	98
2	No					18.33%	22
	Total					100%	120

Q3 - If yes, please tell us why you would be interested in a Master's degree in Marriage and Family Therapy.

I'm interested in becoming a clinical counselor, possibly for young girls, high school level.

I debating at this moment, however, I am interested to look in to the Master's degree because I was a pastor's wife years ago and currently an associate pastor at my church and have been dealing and counseling with marriage and family conflict. I believe marriage and family are like a fortress where it has to be strong and be able to withhold any conflicts or danger.

Being able to earn my Master's degree in Marriage and Family Therapy will put me in an exact placement for starting my career as a family counselor without me having to find other ways to obtain it that don't specifically cover marriage and family.

I'm interested in the Master's Program; Rehabilitation if Mental Health, which is related to licensing in Marriage and Family Therapy. I'm particularly interested because my goal is to be a licensed therapist with focus on adolescents, dealing with emotional distress; e.g. depression, and aid with the dynamics of healthy interaction between parents and children.

Marriage and family therapy is a field of psychology that I have long been interested in, and I would appreciate any opportunity for accredited study on the subject.

It would allow me to obtain a license in the state of Florida and I believe that would help me secure a job in my field of interest.

I think it would be a great field to go into because I used to go to family therapy.

I would like to pursue a career in marriage and family therapy, combined with a possible doctorate degree. I would like to work in and/or with churches and I am passionate about marriages and families working.

I graduated with a psychology degree from USF and am looking into master's programs. I also had divorced parents and attended family counseling quite often as a child

Family therapy is what I want to do.

APPENDIX C: Copies of the Survey Questions and Responses

I have an interest in working as a marriage and family therapist because I enjoy studying and helping clients work through interpersonal relationships. I am still deciding if I want to work in an agency setting or in private practice but I would be interested in marriage and family therapy as a focus.

I would be interested because my goal is to be a therapist, although i haven't figured out what kind of therapy i would want to do, just to get an idea or follow a degree plan would be very beneficial for me.

I want to become a family counselor.

There are multiple reasons, the obvious: to procure a good career, the intrinsic value of helping individuals and families, and personal experience helping friends whose families are in crisis or on the verge of divorce.

I want to do some kind of therapy clinically so this would be a good path to take to work with people of all ages and complex relationships

With divorce rates at an all-time high, I believe it would be beneficial to society to have a program to help address the crisis.

Counseling has always been of interest. Most of all, I have had an interest in the family-oriented side of things.

I am interested in applying for a Master's degree in Marriage and Family Therapy because I was very interested in becoming a licensed Marriage and Family therapist.

Marriage and Family is a field that I want to concentrate on.

Interestingly, I was planning on applying for the Rehabilitation and Mental Health Counselling MA with the concentration in marriage and family therapy!

This is a broad field for many majors and would be an excellent program to get licensed through.

I am interested because I want to be a family therapist. Plus being licensed in Florida can open a lot of doors.

It's similar to my interest in child development.

I think a Master's degree in Marriage and Family Therapy would be an awesome career. I have always been interested in working with children and their families to get them on the right tracks for their future and this would be the perfect opportunity.

I want to be a trauma therapist and family origin is a key to understanding the background from which a client is coming from

Today's families are so fragile, as it is. I feel that therapy to offer support and contribute to the well-being of the family, as a whole, is very important to our community and society. As a marriage fails, a ripple effect is carried over into so many parts of the connection: children, friends, jobs, etc. Having the opportunity to help people navigate through this difficult time could be rewarding.

Because I would like options at this school for a master's degree for different types of counseling.

I am interested in obtaining my own private practice in helping out families, children, couples, divorce, etc. It would help lead me on the right track for my future career.

Because it is a field I have an interest in and would love to stay at USF to possibly pursue it.

I am interested in this Master's degree, as well as one in mental health and substance abuse counseling. These three forms of counseling will be very useful for me, being that I would like to counsel veterans. Most veterans suffer from daily issues in one of, if not all of these categories. Being

APPENDIX C: Copies of the Survey Questions and Responses

a veteran myself, I know that it can be very difficult to get help in this area, or find someone that you feel understands all of your issues.

Because no family or relationship is perfect and everyone needs a little help sometimes

I think a huge source of stress for people comes from their relationships with family members. I would love to help teach people how to interact with others, starting with those closest to them.

I'm interested in obtaining this degree to be able to help families that are having difficulty communicating or overcoming struggles they are facing.

I've been debating whether to go the clinical therapy route or the school psych. Route

I'm majoring in psychology, and want to help patients, but I don't necessarily want to go down the clinical route

I currently intern at a counseling center, and all the counselors here have either a Master's degree or PhD in Marriage and Family Therapy or in Mental Health Counseling. I graduate in December, and I am currently researching Master's programs and am very strongly considering getting a Master's degree in Marriage and Family Therapy.

It has been my career goal to obtain a master's in the field, and I prefer USF because it is close to home and affordable. I am currently taking an off year to find out which direction I will go since USF did not offer a specific Marriage/Family Therapy degree.

I think there is not enough family counselors in the area.

I believe it would help expand my career options in the future to obtain this degree.

I'm interested because I'd like to practice marriage therapy someday.

Family is something we all have in common. Some are good, some aren't. If I could help families facilitate interaction and cultivate healthy relationships, it would be the ultimate compensation. This also applies to marriage and relationships. Relationships are crucial to our well-being. Learning the tools to create and sustain a healthy relationship would be beneficial to both the therapist and the clients.

Not only are you earning a degree, but you are eligible for certification also.

It relates to the career I am interested in

The license in marriage and family therapy is a great incentive!

Complex family dynamics is a common factor within social work and having an educational background in this could be beneficial

I would love to provide therapy for families, individuals, groups, etc. I think being a LMFT would allow me to do that in the best manner. Being able to address their needs, whether they be every day issues or mental health issues, is very important to me.

Because I want to be a counselor. It's the next step of my education career, after i'm done acquire my bachelor's degree. I want to help family along with their children that is struggling in the mental health and substance abuse. Also, i want them to learn, manage, and how they can living with people who are struggling with those behavioral healthcare challenges. For me to be able to do that, would make me, my family, and others proud.

I believe having this degree would allow me to have multiple career opportunistic

APPENDIX C: Copies of the Survey Questions and Responses

Q4 - If no, please tell us why you would not be interested?

More interested in clinical applications of psychology

I am not interested in being involved in the field of therapy.

Interested in pursuing a doctoral graduate degree

I have already chosen to pursue a career in ABA. I have a lot of friends who wish to have this degree but this field is not for me.

I would not be interested because I would like to pursue a different career path.

My goal is to become a neurologist. But, this option is interesting and possibly something I would consider pursuing instead.

I'm more interested on being a dentist; however, if that plan doesn't come thru then, this could be something I would love to do.

I think family therapy would be interesting but it's not enough to encourage me to pursue a master's in it. Especially since my interest is neuropsychology.

More interested in mental health/adolescents

Looking for a degree in another field

I am interested in something else

I am interested in going into forensic psychology

I selected "no" because there is no option for "little interest/I don't know." It's a very specific specialization. Maybe if I knew better about the topic I would be more interested.

I already have a grad school plan for speech therapy. However, I think it would be a very good addition to the college.

Q5 - What areas of concentration or types of courses would you like to have included in a masters of Marriage and Family Therapy?

Counseling techniques, family dynamics

Some concentration or types of courses would be fundamental of counseling, abnormal marriage and family psychology (what are signs that you can detect, etc.), and social services.

Family building, recovery from traumatic experiences, counseling

Economics and family would be interesting, due to the growing number of families where one spouse makes more than the other.

Something that may interest me is learning signs of emotional distress/abuse, the type of distress, and the correct way to assess and aid in those type of situations in a session. As well as how to correctly get the family involved without causing any additional strain/distress.

I'm not sure of a course in specific but I believe one that teaches how to assist those who need help in a family or romantic relationship would be beneficial.

Anything that's hand on.

APPENDIX C: Copies of the Survey Questions and Responses

Bullying, overachieving, dealing with/preventing divorce.

Abusive relationships verbal and physical

Psychology of Aging, Psychology of Relationships, and some sort of training courses.

I have an interest in working in trauma services and marriage counseling.

How to speak to subjects, the types of questions you should ask. How to handle all the information they tell you. What kind of questions to help them speak out about how they are feeling. I would like courses like that in order to help getting your patients to speak up

Marriage law and divorce counseling

Individual counseling for husband and wife as each should be seen separately as well as counseling for children of various ages groups and of course classes specializing couples and family therapy.

Family divorce Dealing with loss Healthy relationships and responsibility

Spirituality and counseling, psychotherapy, psychopathology and family dynamics, new marriages, therapeutic techniques, philosophy of marriage and family counseling.

I feel there should be courses based around the type of therapy methods, clinical courses, and also different family and marriage classes.

N/A

I would like to concentrate on adult relationships, divorce counseling, domestic violence, sexual assault, mental health, sexuality studies, pretty much anything but children and substance abuse.

Something to do with dynamics in marriage that deal w/ sexual lives of the partners. There is not a lot of focus on this area but it is very important.

Family systems, recovery classes, clinical therapy.

I would like to have courses such as child development and how its affected by negative family relationships

Trauma, sexual abuse/addiction, parenting styles, behavior modification (nature vs nurture)

In regard to family therapy, I see a need for counseling that can help families, and children, understand the changes that have taken place in our society. Mothers and fathers are working extended hours outside the home to offset the economic burdens they may bear; siblings are taking on the role of caregiver for your brothers and sister, giving up their childhood to help secure daily functions within the household. Another strong area of interest, for me, is the role of the elderly within the family. Grandparents are a vital part of a family's structure; and, often, are anxious to be a part of the blended lives of their children, grandchildren, or great-grandchildren.

Children

Therapy skills Family networking Counseling tips

I'm not sure, I don't know too much about the types of courses, but I would say ones that involve understanding human relationships, how people have different thought processes, and how to notice where improvement is needed in a relationship and where improvement isn't, so including both the negative and positives of a relationship.

APPENDIX C: Copies of the Survey Questions and Responses

I would like to see courses that help divorced families work together, courses on strengthening communication between couples struggling in their marriage, and I would also like to courses that teach how to make better family communication.

I think it would be interesting to also include classes on non-traditional relationships and co-parenting.

Couples counseling and domestic violence Life span development

Trauma informed therapeutic approach

Courses designed to teach me how to counsel and go over the various things I might encounter as a counselor.

Conversational techniques like Doctor/Patient (interpersonal relationships) communication course. And a class about alternative approaches, cross cultural approaches, etc... that include artistic expression and expression/communication through other senses. Music, dance, poetry, sensory garden, nature walk settings, etc. Broadening understanding of the function of marriage and relationships in other cultures.

I'd love a course focusing on counseling for LGBT individuals.

I would like to learn and relationships and the different types. I would like to learn how family and marriage are affected by all sorts of intersections, such as socioeconomic status, gender, race, and religious backgrounds.

Mental health counseling Substance Abuse Courses on raising children with special needs

Social interactions, sex, family relationships

Courses that focus on the individual in a group dynamic. Courses in human behavior Courses focusing on the governmental policies and the laws associated with all family types -adoption, parents incarcerated, kinship care

School therapy, mental health counseling, veteran therapy.

Dealing with family lifestyles challenges within the family. Substance abuse and mental health, like co-occurring disorder. Focusing on children of five to eighteen years old.

Child Trauma

Appendix C: Responses on Collaboration from Universities with Similar Programs

University of South Florida's letter to other programs in the State:

April 8, 2019

For the last 45 years, the University of South Florida has been graduating students in our master's degree in Rehabilitation and Mental Health Counseling. The program is CACREP accredited for Rehabilitation Counseling and Mental Health Counseling. For the last 20 years, we have offered a 15 credit concentration in Marriage and Family Therapy that students could complete in connection with their master's degree. We have anywhere from 15 to 25 students a year that add the MFT concentration to their master's degree.

As a result of the popularity and longevity of the MFT concentration and based on a job market analysis we are pursuing the creation of a 60 credit COAMFTE accredited MFT master's degree at the University of South Florida. There are currently no MFT programs in the Tampa, St. Pete, Clearwater area and we see a local need that could be met by offering an MFT program at USF. Based on the current student interest in our concentration and the job market demand we believe that we can fill that local need without affecting your programs enrollment.

We wanted to reach out to seek your support in offering an additional MFT master's degree in the State of Florida and to see if there are opportunities for collaboration on research or clinical specializations between our Universities. For example, I am one of a few certified EFT supervisors in the state of Florida and would be happy to be a guest speaker on that topic either through skype or in person. We hope to establish a close working relationship with your program and faculty. I look forward to working together to grow the field of Marriage and Family therapy in the State of Florida.

Sincerely,

Ryan Henry, Ph.D., LMFT
Director of Graduate Certificate in Marriage and Family Therapy
Rehabilitation & Mental Health Counseling Program
Department of Child & Family Studies
University of South Florida
13301 Bruce B Downs Blvd., MHC 1632
Tampa, FL 33612-3807
(813) 974-0969
rghenry@usf.edu
<http://rmhc.bcs.usf.edu/>

Appendix C: Responses on Collaboration from Universities with Similar Programs

Response from NOVA Southeastern University:

Hello Dr. Henry,

Thank you for reaching out to NSU and congratulations on your decision to seek COAMFTE accreditation for your MS program. I am copying our program directors to see if they have ideas for collaboration.

I wish you the best!

Martha

Martha Gonzalez Marquez, Ph.D., LMFT

Department Chair, Associate Professor

Department of Family Therapy

College of Arts, Humanities, and Social Sciences

Office (954) 262-3056

martmarq@nova.edu

nova.edu



Response from University of Florida:

Hi Ryan,

Thank you for reaching out to us! Please let me know your specific research interest and I will see if it connect with the interest of any of our faculty that I might be able to connect you with.

take care,

Jacqueline

jswank@coe.ufl.edu

APPENDIX D: Faculty CVs

Tammy Jorgensen Smith, PhD, CRC
 University of South Florida
 College of Behavioral and Community Sciences
 Department of Child and Family Studies
 Rehabilitation and Mental Health Counseling Program
 13301 N. Bruce B. Downs Blvd. Tampa, FL 33620
 813- 974-0973 (O) 813-974-8080 (F)
 Email: tjsmith@bcs.usf.edu

ACADEMIC PREPARATION

Ph.D. Counselor Education; Specialty: Leadership (CACREP) 2004
 Barry University; Orlando, FL

Master of Science in Rehabilitation Counseling (CORE) 1996
 Florida State University; Tallahassee, FL

Bachelor of Science: Psychology; Minor: Criminology 1993
 Florida State University; Tallahassee, FL

LICENSURE AND CERTIFICATIONS

Certified Rehabilitation Counselor (CRC) - # C-00038307 1999-2019

PROFESSIONAL EXPERIENCE

University of South Florida, (Tampa, FL)
 College of Behavioral and Community Sciences, Department of Child
 and Family Studies, Rehabilitation and Mental Health Counseling Program

- *Tenured Associate Professor* 2016 - Present
- *Assistant Professor* 2010 - 2015

SELECTED GRANTS AND CONTRACTS

External Awards

Achieving Competitive Customized Employment through Specialized Services (ACCESS)

Funding Agency: National Institutes of Health/ National Institute of Mental Health (R34)
 Funding Level: \$698,913
 Role in Project: Principal Investigator
 Description: Test the feasibility, acceptability, and preliminary efficacy of a
 customized employment model through a small randomized controlled
 trial (N=30) of adults with autism.
 Dates: 2017 – 2020

Rehabilitation Services Administration Long-Term Training Grant

Funding Agency: Rehabilitation Service Administration
 Funding Level: \$1,000,000
 Role in Project: Principal Investigator

APPENDIX D: Faculty CVs

Description:	Increase the supply of qualified personnel available for employment in the public rehabilitation sector.
Dates:	2015 - 2020

Collaborative on Discovery and Innovation in Employment

Funding Agency:	Florida Developmental Disabilities Council, Inc.
Funding Level:	\$252,000
Role in Project:	Co-Principal Investigator
Description:	Building the capacity of school districts to implement a person-centered planning process (Discovery) and job development activities that result in youth with complex disabilities gaining customized employment.
Dates:	2011-2013

Student Website on Employment and Transition

Funding Agency:	Florida Developmental Disabilities Council, Inc.
Funding Level:	\$88,257
Role in Project:	Principal Investigator
Description:	Development and updating of an interactive website addressing customized employment and transition for students, families, school personnel and the adult service system.
Dates:	2009-2011

One Stop Service Center Initiative

Funding Agency:	Florida Developmental Disabilities Council, Inc.
Funding Level:	\$90,000
Role in Project:	Principal Investigator
Description:	Research to identify barriers to serving individuals with disabilities at One Stop Service Centers
Dates:	2009-2010

SELECTED PUBLICATIONS*Refereed Journal Articles*

1. **Smith, T.J.**, Dillahunt-Aspillaga, C.J., Chou, C.C., *Ching, D. & *Weston, A. (in review). Rehabilitation Scholarship Program – A Solution to Personnel Shortages in the Vocational Rehabilitation System. Submitted to the *Journal of Vocational Rehabilitation*.
2. **Smith, T.J.**, & Dillahunt-Aspillaga, C.J., (in press). Accessibility of One Stop service centers: Perspectives of persons with disabilities and One Stop center staff. Submitted to *Journal of Applied Rehabilitation Counseling*.
3. **Smith, T.J.**, Dillahunt-Aspillaga, C.J., *Ching, D., & *Weston, A. (2019). Achieving Competitive, Customized Employment through Specialized Services (ACCESS). *Journal of Vocational Rehabilitation*, 50(3), 249-258. doi:10.3233/JVR-191004
4. **Smith, T.J.**, Berkman, K., Richmond, S., Fitzpatrick, M., & Dillahunt-Aspillaga, C.J. (2019). Post-secondary education and employment for youth with autism: Preliminary

APPENDIX D: Faculty CVs

results from a customized transition program. *Rehabilitation Research, Policy and Education*, 33(1); 65-75. <http://dx.doi.org/10.1891/2019.33.1.1234>

5. **Smith, T.J.**, Dillahunt-Aspillaga, C.J., & Kenney, R.M. (2016). Implementation of customized employment provisions of the Workforce Innovation and Opportunity Act in vocational rehabilitation systems. *Journal of Disability Policy Studies*, 27(4), 1-8. DOI: 10.1177/1044207316644412
6. **Smith, T.J.** & Dillahunt-Aspillaga, C.J. (2016). Gauging the impact of Discovery on the self-determination of students with developmental disabilities. *American International Journal of Contemporary Research*, 6(3), 1-9.

Technical Reports

1. **Smith, T. J.** (2010). *Florida state of the state on employment for people with developmental disabilities*. Tallahassee, FL: Florida Developmental Disabilities Council, Inc. [Prepared for the FDDC; FY2011-2015 state plan report].
2. **Smith, T. J.**, & Noel, D. (2010). *One stop service center initiative report*. Tallahassee, FL: Florida Developmental Disabilities Council, Inc.

SELECTED CONFERENCE PRESENTATIONS

International

- Smith, T.J.** (2015). *Integrating Customized Employment Strategies for Competitive Employment Outcomes*. Presentation at the International Association of Rehabilitation Professionals conference in New Orleans, LA.
- Smith, T. J.** (2006, June). *Florida Freedom Initiative*. Paper presented at the meeting of the YAI International Conference on Intellectual and Developmental Disabilities, New York, NY

National

- Smith, T.J.** (2019, June). *Achieving Competitive, Customized Employment through Specialized Services (ACCESS)*. National Webinar for the Disability and Rehabilitation Research Project at Virginia Commonwealth University, Richmond, VA. [Invited]
- Smith, T.J.** & Boutot, N. (2018, June). *Partnerships for Success: Demystifying Customized Employment for Employers*. Presentation at the National APSE conference in Orlando, FL. [Invited]
- Smith, T.J.**, Dillahunt-Aspillaga, C. & Ching, D. (2018, June). *Achieving Competitive, Customized Employment through Specialized Services (ACCESS)*. Presentation at the National APSE conference in Orlando, FL.

State

- Smith, T. J.** & Weston, A*. (2019, May). *Finding Balance in Life and Work*. Presentation at the 2nd Annual Healthy Minds Conference, Orlando, FL.

APPENDIX D: Faculty CVs

- Smith, T.J.** (2018, September). *Achieving Competitive, Customized Employment through Specialized Services (ACCESS)*. **Keynote** presentation at the Florida Rehabilitation Association Conference, Orlando, FL [Invited].
- Smith, T.J.** (2016, August). *Multicultural Counseling Ethics*. **Keynote** presented at the Florida Rehabilitation Association Conference, Orlando, FL [Invited].
- Smith, T.J.** (2016, February). *Integrating the customized employment process into the VR system*. **Keynote** presented at the FCIC Virtual Employment Conference – Talent Actualized, Tampa, FL.
- Smith, T. J.** (2014, October). *Successful employment outcomes through discovery*. **Keynote** presented at the meeting of the Florida Rehabilitation Association, Orlando, FL [Invited].

SELECTED CONFERENCE PLANNING AND DEVELOPMENT

- Knab, J., **Smith, T.J.**, Boutot, N., et al. (2018, April). 2nd Annual Making Wellness a Priority: Healthy Minds and Healthy Futures. SEDNET, FLAPSE, DCF, and VR. Omni Resort Championsgate, Orlando, Florida.
- Clark, B., **Smith, T.J.**, & Souders, D. (2019, April). Fourth Annual FCIC Virtual Employment Conference – Talent Actualized: Realize the Potential. Florida Center for Inclusive Communities. Online.

TEACHING

University of South Florida

College of Behavioral and Community Sciences, Rehabilitation and Mental Health Counseling [Clinical Rehabilitation Counseling Program]

Social and Cultural Foundations of Counseling (Online)	RCS 6440
Career and Lifestyle Assessment	RCS 6301
Rehabilitation Counseling: Concepts & Applications	RCS 5035
Medical Aspects of Disabilities (Online)	RCS 5080
Customized Employment Strategies in Rehabilitation (Online)	RCS 6930
Independent Study (Research)	RCS 6906
Issues and Trends in Developmental Disabilities (Online module)	MHS 6065

HONORS AND AWARDS

Awards

CBCS Outstanding Research Accomplishment Award	2018
Albert Nelson Marquis Achievement Award	2017
National Association for Persons Supporting Employment First - Research Award	2014

PROFESSIONAL ORGANIZATIONS

American Rehabilitation Counseling Association - #6323407	2018-present
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APPENDIX D: Faculty CVs

American Counseling Association - #6323407	2010-present
National Council on Rehabilitation Education (RMHC membership)	2010-present
National Association for Persons Supporting Employment First - #29807	2010-present
Florida Association for Persons in Supported Employment - #29807	2010-present

JOURNAL EDITORSHIPS AND REVIEWER ACTIVITIES

Editorial Boards

<i>International Journal of Autism and Related Disabilities</i>	2017-present
<i>Journal of Rehabilitation</i>	2014-present
<i>Journal of Vocational Rehabilitation</i>	2013-present

National Workgroups

NIMH Autism Across the Lifespan Workgroup	2018-present
AUCD Autism Special Interest Workgroup	2016-present
AUCD Council on Research and Evaluation	2016-present

SELECTED PROFESSIONAL, COMMUNITY, & UNIVERSITY SERVICE

Association of Persons Supporting Employment First Board Member Florida Chapter; Vice President	2015-present
Florida Rehabilitation Association Board Member	2016-2017
Customized Employment Certificate Course (Florida - statewide)	2010-present

University

Johnson Scholars Foundation Selection Committee	2017-present
Rehabilitation Science Doctoral Program	

College of Behavioral and Community Sciences

Curriculum Committee	2016-present
Tenure and Promotion Committee	2016-present

Florida Center for Inclusive Communities

Association of University Centers on Disability - Council on Research and Evaluation	2015- present
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APPENDIX D: Faculty CVs

Vicky Buckles PhD. LMHC, CRC
386-972-1002
vbuckles@usf.edu

Education

University of Florida, Gainesville, Fl.

PhD in Rehabilitation Science

May 2011

Dissertation: "Exploring the Applicability of Life Care Plans to Address Barriers within the State Adoption System"

University of Florida, Gainesville, Fl.

Master's Degree in Rehabilitation Counseling

May 2004

University of Florida, Gainesville, Fl.

Bachelor's Degree in Health Science

May 2002

Professional Non-Academic Employment

February 2012 – January 2017: Clinical Director/ Putnam Operations, **Stewart-Marchman-Act Behavioral Healthcare**, Palatka, Fl.

Oversee the day to day operations of the outpatient clinic as well as program development at the Palatka outpatient clinic. Coordinate, hire, and supervise 13 different outpatient programs including mental health/substance abuse counseling and physician service programs among others. Supervise a staff of 20 therapist and clinicians providing guidance on therapeutic techniques and assuring fidelity of evidence based practices. Review charts and assure they meet Medicaid and 65-D30 standards, as well as holding clinicians responsible for meeting these standards. Practice in grant writing to receive additional funding to develop new programs. Participate in community meetings to build collaborative relationships with the agency. Develop and provide staff trainings.

January 2011 to January 2012: Clinical Director/ Mental Health Counselor; **Putnam Behavior Healthcare**, Palatka Fl.

Supervisor of the agency clinical programs, therapist, and outpatient services. Provided theory based counseling services to children with a variety of diagnoses. Maintained a caseload of approximately 30 children, performed biosychosocial evaluations, administered depression scales, performed in-depth clinical interviews and maintained patient files.

April 2008 – December 2010: Children's Mental Health Counselor; **Putnam Behavior Healthcare**, Palatka Fl.

Provided theory based counseling services to children with a variety of diagnoses. Maintained a caseload of approximately 30 children, performed biosychosocial evaluations, administered depression scales, performed in-depth clinical interviews and maintained patient files.

October 2006 – Present Children's Mental Health Counselor; **North Florida Psychological Services**

Provided theory based counseling services to children with a variety of diagnoses. Maintained a caseload of approximately 10 children, performed biosychosocial evaluations, complete treatment plans and maintain patient files. Administered intelligence, achievement, and ADHD testing as well as completed psychological reports for disability determination.

July 2004 – October 2006 Children's Mental Health Counselor; **Putnam Behavior Healthcare**, Palatka Fl.

Provided theory based counseling services to children with a variety of diagnoses. Maintained a caseload of approximately 30 children, performed biosychosocial evaluations, administered depression scales, performed in-depth clinical interviews and maintained patient files.

Professional Academic Employment

January 2017 – Present **Instructor and Director of Addictions and Substance Abuse Certificate, University of South Florida, Tampa, Fl.**

- Oversee program and course development in regards to Graduate and Undergraduate Addictions and Substance Abuse Certificates.

APPENDIX D: Faculty CVs

- Establish admission criteria and review student applications for admission
 - Provide online instruction of all substance abuse certificate courses
 - Advise and guide students regarding the field of Substance Abuse Counseling
- August 2011 – December 2011 **Adjunct Faculty, University of Florida, Gainesville, FL.**
- Taught “Therapeutic Communication Skills”. Developed syllabus, overall course structure, assignments, test, and administered all grades. Utilized Blackboard to review assignments, communicate with students, and track grades. Organized and supervised 6 teaching assistant and an addition 12 lab sections.
- August 2011 – December 2011 **Adjunct Faculty, University of Florida, Gainesville, FL.**
- Taught Psychosocial Aspects of Rehabilitation. Developed syllabus, overall course structure, assignments, test and administered all grades. Utilized Blackboard to review assignments, communicate with students, and track grades
- August 2010 – December 2010 **Instructor, University of Florida, Gainesville, FL.**
- Taught “Therapeutic Communication Skills”. Developed syllabus, overall course structure, assignments, test, and administered all grades. Utilized Blackboard to review assignments, communicate with students, and track grades Organized and supervised 4 teaching assistant and an addition 12 lab sections.
- August 2010 – December 2010 **Instructor, University of Florida, Gainesville, FL.**
- Taught Psychosocial Aspects of Rehabilitation. Developed syllabus, overall course structure, assignments, test and administered all grades. Utilized Blackboard to review assignments, communicate with students, and track grades
- August 2009 – December 2009 **Adjunct Instructor, St. Johns Community College, Palatka, FL.**
- Medical Terminology in-class section
- Developed syllabus and overall course structure, and administered all grades
- Medical Terminology on-line section
- Developed syllabus, overall course structure, and administered all grades. Also responsible for managing all internet based activities for the course. The online course was taught utilizing blackboard platform for assignments, test administration, grading, discussion boards, and overall course structure.
- August 2009 – December 2009 **Instructor, University of Florida, Gainesville, FL.**
- Taught Psychosocial Aspects of Rehabilitation. Developed syllabus, overall course structure, assignments, tests, and administered all grades. Utilized Blackboard to review assignments, communicate with students, and track grades
- June 2009 – August 2009 **Adjunct Instructor, St. Johns Community College, Palatka, FL.**
- Medical Terminology in-class section
- Developed syllabus and overall course structure, and administered all grades
- January 2009 – May 2009 **Adjunct Instructor, St. Johns Community College, Palatka, FL.**
- Medical Terminology in-class section
- Developed syllabus and overall course structure, and administered all grades
- January 2009 – May 2009 **Instructor, University of Florida, Gainesville, FL.**
- Taught “Therapeutic Communication Skills”. Developed syllabus, overall course structure, assignments, test, and administered all grades. Organized and supervised 4 teaching assistant and an addition 12 lab sections.
- August 2008 – December 2008 **Instructor, University of Florida, Gainesville, FL.**
- Taught Psychosocial Aspects of Rehabilitation. Developed syllabus, overall course structure, assignments, tests, and administered all grades
- August 2009 – December 2009 **Graduate Teaching Associate, University of Florida, Gainesville, FL**

APPENDIX D: Faculty CVs

- Teaching assistant for Survey of Disease and Disability: Collaborated on curriculum and exam development, met with students upon request, and graded all written work as well as exams.
- Teaching assistant for Critical Thinking: facilitated lab sessions, promoted student learning, graded all written assignments, and manage class grades.

January 2009 – May 2009 **Teaching Assistant, University of Florida, Gainesville, Fl.**

- Teaching assistant for Therapeutic Communication Skills: facilitated lab sessions, promoted student learning, graded all written assignments, and manage class grades.
- Teaching assistant for Disability Management: Collaborated on curriculum and exam development, met with students upon request, and graded all written work as well as exams.

August 2008 – December 2008 **Teaching Assistant, University of Florida, Gainesville, Fl.**

- Teaching assistant for Leadership Skills: facilitated lab sessions, promoted student learning, graded all written assignments, and manage class grades.
- Teaching assistant for Survey of Disease and Disability: Collaborated on curriculum and exam development, met with students upon request, and graded all written work as well as exams.

January 2008 – May 2008 **Teaching Assistant, University of Florida, Gainesville, Fl.**

- Teaching assistant for Therapeutic Communication Skills: facilitated lab sessions, promoted student learning, graded all written assignments, and manage class grades.

August 2007 – December 2007 **Teaching Assistant, University of Florida, Gainesville, Fl.**

- Teaching assistant for Critical Thinking: facilitated lab sessions, promoted student learning, graded all written assignments, and manage class grades.

January 2007 – May 2007 **Teaching Assistant, University of Florida, Gainesville, Fl.**

- Teaching assistant for Therapeutic Communication Skills: facilitated lab sessions, promoted student learning, graded all written assignments, and manage class grades.

August 2006 – December 2006 **Teaching Assistant, University of Florida, Gainesville, Fl.**

- Teaching assistant for Leadership Skills: facilitated lab sessions, promoted student learning, graded all written assignments, and manage class grades.

January 2006 – May 2006 **Teaching Assistant, University of Florida, Gainesville, Fl.**

- Teaching assistant for Therapeutic Communication Skills: facilitated lab sessions, promoted student learning, graded all written assignments, and manage class grades.

Peer Reviewed Publications

Buckles, V., & Pomeranz, J.L. (2017). Exploring Special Needs Adoptions and the Applicability of Life Care Plans. *Journal of Life Care Planning*, 15 (1), pgs. 25-33.

Buckles, V., Pomeranz, J.L., & Young, M.E. (2009). The applicability of the life care plan for adopted children with disabilities. What will Medicaid pay? *The Journal of Life Care Planning*, 7, 107-122.

Presentations

Buckles, V., Pomeranz, J.L., & Young, M.E. (2009). The applicability of the life care plan for adopted children with disabilities. Break out session at the International Symposium on Life Care Planning. Scottsdale, AZ September 2011.

APPENDIX D: Faculty CVs

Buckles, V., Pomeranz, J.L., & Young, M.E. (2009). The Applicability of the Life Care Plan for Adopted Children with Disabilities: What will Medicaid Cover? Poster presentation at the University of Florida 2008 PPHP Research Day, Gainesville, Fl. April 2008

Buckles, V., & Pye, A. (2016). Domestic Violence and Substance Misuse: A Guide to Treating Survivors. FADAA Behavioral Health Conference, Orlando, Fl. August 2016.

Buckles, V., (2017). Integration of Motivational Interviewing and CBT in the Treatment of Addictive Disorders. FADAA Behavioral Health Conference, Orlando, Fl. August 2017.

Buckles, V., Dillahunt, T., (2019). Medical Aspects of Evaluation & Life Care Planning. FADAA IARP Regional Conference, Tampa, Fl. January 2019.

Awards

2008 Foundation of Life Care Planning Student Paper Award Winner

2009 John Muthard Research Award, University of Florida

2010 Graduate Teaching Assistant Award, University of Florida

Certifications

Certified Clay Therapist

Licensed Mental Health Counselor
MH 11456 Expiration March 2021

Certified Rehabilitation Counselor
073991 Expiration March 2023

Qualified Supervisor for LMHC

Certified Adoption Competent Counselor

APPENDIX D: Faculty CVs

CURRICULUM VITAE

Michael G. Dow, Ph.D.

ADDRESS AND TELEPHONE

Department of Mental Health Law & Policy Email: dow@usf.edu
Florida Mental Health Institute
University of South Florida
MHC2633
13301 Bruce B. Downs Blvd.
Tampa, FL 33612-3817
(813) 974-1928

EDUCATION

- B.S. Psychology and B.S. General Science
University of Oregon, 1979
Advisor: Anthony Biglan, Ph.D.
- M.S. Psychology
The Pennsylvania State University, 1981
Major Area: Clinical Psychology
Thesis: Social Inadequacy and Depression
Advisor and Chair: W. Edward Craighead, Ph.D.
- Ph.D. Psychology
The Pennsylvania State University, 1983
Major Area: Clinical Psychology
Minor Area: Research and Design Statistics
Minor Area: Teaching Psychology
Dissertation: Peer Validation and Ideographic Analysis of Social Skill and Deficits
Advisor and Chair: W. Edward Craighead, Ph.D.

LICENSURE STATUS

Licensure in Florida, PY0003570, as a Psychologist

JOURNAL EDITORIAL EXPERIENCE

Editorial Board Member, Clinical Psychology: Science and Practice, 2010-present

CURRENT POSITION

Professor (tenured), Department of Mental Health Law & Policy, Florida Mental Health Institute, University of South Florida, 2/01-current. (Note: In February of 2001, the Department of Community Mental Health was reorganized as part of Mental Health Law & Policy.)

TEACHING EXPERIENCE

MHS 4425, Field Experience, Summer 2013, Fall 2013, Spring 2014.

APPENDIX D: Faculty CVs

RCS 6408, Diagnosis and Treatment of Psychopathology, Fall 2012, Fall 2013.

RCS 6220, Individual Evaluation and Assessment, Fall 2010, Spring 2011, Fall 2011, Spring 2012, Spring 2013, Fall 2013, Spring 2014.

RCS 6803, Practicum I or Practicum II, Spring 2009, Summer 2009, Fall 2009, Spring 2010, Summer 2010, Fall 2010, Spring 2011, Summer 2011, Fall 2011, Spring 2012, Summer 2012, Spring 2013, Summer 2013, Spring 2014.

MHS 4408, Evidence-Based Practices, Spring 2007.

RCS6455, Practicum II, Rehabilitation and Mental Health Counseling, Fall 2004.

Abnormal Psychology, Department of Psychology, USF, Fall 1989.

UNIVERSITY/COMMUNITY EXPERIENCE

Chairperson, Advisory Board, University Area Community Social Services Center, 2004-current.

Member, Department of Rehabilitation and Mental Health Counseling, Tenure and Promotion Committee, 2012-2013.

Member, Associate Dean for Research and Search Committee, College of Behavioral and C Community Sciences, 2013-2013.

CLINICAL EXPERIENCE

Independent Contractor Psychologist (Private Practice), Office of Disability Determination, Tampa, FL 7/94-current. This position involves review of written materials and making disability Determinations for SSI and SSDI.

Psychologist, Tampa Family Health Centers, Inc. I saw about five low income adults in Individual therapy per week at this federally qualified inner city health center. I also supervised a USF psychology intern who also provided individual therapy at this site, 8/2005- 8/2009.

SELECTED PUBLICATIONS

Dow, M. G. (1993). Affective disorders. In A. S. Bellack & M. Hersen (Eds.), Handbook of behavior therapy in the psychiatric setting (pp. 251-268). New York: Plenum.

Doe, M.G. (1994). Social skill and social inadequacy. In L. W. Craighead, W. E. Craighead, A. E. Kazdin, & M. J. Mahoney (Eds.), Cognitive-behavioral interventions (pp. 123-140). Boston: Allyn & Bacon.

Dow, M. G. (1994). Behavior therapy: Clinical procedures or a clinical approach to psychological Disorders? [Review of Contemporary behavior therapy (2nd ed.)]. Contemporary Psychology, 39, 629-630.

Dow, M. G., Boaz, T. L. (1994). Assisting clients of community mental health centers to secure SSI benefits: A controlled evaluation. Community Mental Health Journal, 30, 429-440.

Dow, M. G., Kearns, W., & Thornton, D. H. (1996). The Internet II: Future effects on cognitive Behavioral practice. Cognitive and Behavioral Practice, 3, 137-157.

Dow, M. G. (1998). Depression and HIV Disease (pp. 161-177). In M. Knox and C. Sparks (Ed.), HIV

APPENDIX D: Faculty CVs

and Community Mental Healthcare. Baltimore: Johns Hopkins Press.

Dow, M. G., Boaz, T. L., & Thornton, D. (2000). Risk adjustment of the Florida Mental Health Outcomes Data: Concepts, Methods, and Results. In K. M. Coughlin (Ed.) 2001 Behavioral Outcomes & Guidelines Sourcebook. New York: Faulkner and Gray, pp. 264-378. (Reprinted from Journal of Behavioral Health Services & Research, 2001.)

Dow, M. G., & Rich, A. (2001). Social Competence (pp. 1555-1557). In W. E. Craighead & C. B. Nemeroff (Eds.), The Corsini Encyclopedia of Psychology and Behavioral Science (3rd Ed.). New York: Wiley.

Dow, M. G. Boaz, T. L., & Thornton, D. (2001). Risk adjustment of the Florida Mental Health Outcomes Data: Concepts, Methods, and Results. Journal of Behavioral Health Services & Research, 28, 273-286.

Dow, M. G., Boaz, T. L., & Ward, J. C. (2002). Case mix adjustment of Children's Functional Assessment Rating Scale. In C. Newman, C. J. Liberton, K. Kutash, & R. M. Friedman (Eds.), The 15th annual research conference proceedings, a system of care for children's mental health expanding the research base. Tampa, FL: University of South Florida.

Clark, C. F., Dow, M. G., & Knox, M. D. (2005). Treatment of Mental Health Issues. In C. Steinhart, J. Orrick, K. Simpson (Eds.), HIV/AIDS Primary Care Guide (2nd Edition). Gainesville, FL: University of Florida.

Dow, M. G. (2012). Roots of Recovery Movement in Psychiatry: A review. Journal of Human Development, Disability, and Social Change, 20, 123-124.

Clark, C., Young, S., & Dow, M. G., (2013). Can strengthening parenting couples' relationships reduce at-risk parenting attitudes? The Family Journal, 21, 306-312.

SELECTED CONFERENCES PRESENTATIONS

Dow, M. G. (2004, May). Hillsborough County needs assessment project: Methods and results. Paper presented at the annual meeting of the Florida Association for Community Action, West Palm Beach, FL.

Dow, M. G. (2005, May). Social Security Disability Programs. Panel presented at the annual meeting of the Florida Association for Community Action, Tampa, FL.

Winarski, J., & Dow, M. (2008, November). Self-Assessment Planning Tool for Implementing Recovery-Oriented Mental Health Services (SAPT), Florida Council for Community Mental Health, and the Florida Psychiatric Rehabilitation Association, Naples, FL.

Winarski, J., & Dow, M. (2008, June). Self-Assessment Planning Tool for Implementing Recovery-Oriented Mental Health Services (SAPT). Paper presented at the United States Rehabilitation Association (USPRA) 35th Annual Conference: Expanding the Horizon of Psychiatric Rehabilitation, Boise, ID.

SELECTED RESEARCH GRANTS AND CONTRACTS

Dow, M. G. (Principal Investigator), & Winarski, J. (2009). Development of the Web-Based ROSI. Department of Children and Families, \$20,000.

Dow, M. G. (Principal Investigator), & Weinberg, R. (2008). Purchase order contract for clinical services

APPENDIX D: Faculty CVs

and supervision, Tampa Family Health Centers, Inc., \$10,000.

Dow, M. G. (Principal Investigator), & Thompson, L. T. (2003). Hillsborough County Needs Assessment Project. Department of Health and Social Services, Hillsborough County, \$24,000.

Dow, M. G. (Principal Investigator) (2003). Training Disability Determination Specialists in Adult Psychopathology and Functional Limitations, Eli Lilly Corporation, \$12,000.

Petrila, J., Stiles, P., Carrocio, D., Thornton, D., Jordan, N., Dow, M. G. (Co-Investigator), Boaz, T. L., and Ward, J. C., (2002-2003). Department of Children & Families/Alcohol Drug Abuse & Mental Health Studies, Florida Department of Children and Families, approximately \$438,000.

Petrila, J., Stiles, P., Carrocio, D., Thornton, D., Dow, M. G. (Co-Investigator), & Boaz, T. L. (2001-2002). Evaluation of Florida Mental Health and Substance Abuse Agencies, Florida Department of Children and Families, approximately \$400,000.

Ward, J. C., Dow, M. G. (Co-Principal Investigator), & Boaz, T. L. (2001-2002). District 7 ADM Program Evaluation and Outcome Assessment Project, Florida Department of Children and Families, District 7, \$82,207.

Dow, M. G. (Principal Investigator), Ward, J. C., Boaz, T. L., Thornton, D. L., & Teague, G. (2000-2001). Evaluation of Florida Mental Health and Substance Abuse Agencies, Florida Department Of Children and Families, \$228,874.

Saunders, T., Ward, J. C., & Dow, M. G. (Co-Principal Investigator) (2000-2001). District 7 ADM Program Evaluation and Outcome Assessment Project, Florida Department of Children and Families, District 7, approximately \$606,000.

Clark, C., Rich, A., Fearday, F., & Dow, M. G. (Co-Investigator). (1999-2000). Manasota Homeless Families Project. Manatee Opportunity Council, \$128,355. (This is part of a federally funded project for approximately \$235,000 that we developed for Manatee Opportunity Council.)

Dow, M. G. (Principal Investigator), Ward, J. C., Boaz, T. L., Thornton, D. L., Teague, G., Armstrong, M. & Massey, T., (1999-2000). Evaluation of Florida Mental Health and Substance Abuse Agencies, Florida Department of Children and Families, \$238,875.

Saunders, T., Ward, J. C., & Dow, M. G. (Co-Principal Investigator) (1999-2000). District 7 ADM Program Evaluation and Outcome Assessment Project, Florida Department of Children and Families, District 7, \$459,662.

APPENDIX D: Faculty CVs

Ryan G. Henry, Ph.D., LMFT

University of South Florida
College of Behavioral and Community Sciences
Department of Rehabilitation and Mental Health Counseling
13301 N. Bruce B. Downs Blvd. Tampa, FL 33620
Phone: (813) 974 9356 Fax: (813) 974 8080
Email: rghenry@usf.edu

EDUCATION

- Ph.D. Brigham Young University (Provo, Utah), 2006
Doctor of Philosophy in Marriage and Family Therapy
- M.A. Brigham Young University (Provo, Utah), 2003
Master of Science in Marriage and Family Therapy
- B.A. University of South Florida, 2001
Bachelor of Science in Gerontology

LICENSES AND CERTIFICATIONS:

- Licensed Marriage and Family Therapist, Florida #MT2333
- Certified EFT Therapist, 2016-present
- Certified EFT Supervisor, 2016-present
- Florida Board Approved LMFT and LMHC Supervisor, 2009-present
- AAMFT Approved Supervisor Candidate, 2019-present

PROFESSIONAL EXPERIENCE

University of South Florida

College of Behavioral and Community Sciences
Department of Child and Family Studies

- Acting Director of the Rehabilitation and Mental Health Counseling program (2018-present)
- *Clinical Instructor* (2012 to present)
 - *Director, Marriage and Family Therapy Certificate Program*
- *Visiting Assistant Professor* (2009 to 2011)
 - *Director, Marriage and Family Therapy Certificate Program*

Henry Therapy, LLC (Wesley Chapel, FL)

- *Private clinical practice* (2008 to present)

LDS Family Services (Richmond, VA)

- *Clinical staff* (2006-2008)

LDS Family Services (Provo, UT)

- *Therapist* (2003-2005)

APPENDIX D: Faculty CVs

Brigham Young University

Department of Marriage and Family Human Development.

- *Instructor* (2003-2005)
- *Teaching Assistant* (2003-2005)
- *Research Assistant* (2002-2005)
- *Marriage and Family Therapy Intern* (2001-2003)

GRANTS AND CONTRACT FUNDED PROJECTSInnovative Teaching Opportunities for iPads

Funding Agency:	University of South Florida
Funding Level:	\$1,000
Role In Project:	Principal Investigator
Description:	Determine how the iPad and accessories can best be used for online teaching.
Dates:	2010

iTopp Grant

Funding Agency:	University of South Florida
Funding Level:	\$1,500
Role In Project:	Principal Investigator
Description:	Purchase and use of Articulate software package to create the first online class for the Department.
Dates:	2009

PUBLICATIONS (Selected)*Refereed Journal Articles*

- Jackson, J. B., Miller, R. B., Oka, M., & Henry, R. G. (2014). Gender differences in marital satisfaction: A meta-analysis. *Journal of Marriage and Family*, 76(1), 105–129. doi:10.1111/jomf.12077
- Lee, M.A., Smith, T.J., & Henry, R.G. (2013). Power politics: Advocacy to activism in social justice counseling. *Journal for Social Action in Counseling and Psychology*, 5(3), 70-94.
- Jorgensen-Smith, T., Reid, J., Henry, R. G., Dixon, C. D., & Wright, T. J. (2013). Evaluating curricular influence on preparation for practice, career outcomes, and job satisfaction: Results from an alumni survey of a 40-year rehabilitation and mental health counseling program. *Rehabilitation Research, Policy, and Education*, 27(1), 43-57. doi:10.1891/2168-6653.27.1.43
- Miller, R. B., & Henry, R. G. (2007). Basic research. In N. J. Salkind (Ed.) *Encyclopedia of Measurement and Statistic, Volume 1* (pp. 72-73). Thousand Oaks, CA: Sage.
- Henry, R. G., Miller, R. B., Giarrusso, R. (2005). Difficulties, disagreement, and disappointments in late-life marriages. *International Journal of Aging and Human Development*, 61, 243-264.
- Henry, R. G., & Miller, R. B. (2004). Marital problems occurring in midlife: Implications for couples therapists. *American Journal of Family Therapy*, 30, 405-517.

APPENDIX D: Faculty CVs

CONFERENCE PRESENTATIONS

National

- Henry, R.G., Miller, R.B., & Call, V. (2004, November). *The effect of surrogate grandparenting on marital satisfaction: A longitudinal study*. Paper presented at the meeting of the Gerontological Society of America, Washington, DC.
- Christenson, J, Miller, R.B., & Henry, R.G. (2004, November). *The transition to parenthood and marital satisfaction: A meta-analysis*. Poster presented at the meeting of the National Council on Family Relations Conference, Orlando, FL.
- Henry, R. G., Manning, J., Miller, R. B., Zitzmann, S., & Northey, B. (2004, September). *Generational differences amongst marriage & family therapists*. Poster presented at the meeting of the American Association for Marriage and Family Therapy, Atlanta, GA.
- Henry, R. G., Miller, R. B., & Giarrusso, R. (2003, November). *Perceived challenges in late-life marriages*. Paper presented at the meeting of the Gerontological Society of America, San Diego, CA.
- Christenson, J., Henry, R. G., Miller, R. B., Gillette, K., Fox, A., Zitzmann, S., & Andersson, L. (2003, November). *Meta-analysis of life course transitions and marital satisfaction*. Poster presented at the meeting of the Gerontological Society of America, San Diego, CA.
- Miller, R. B., Henry, R. G., & Christensen, S. (2003, November). *Gender differences in marital satisfaction: A meta-analysis*. Poster presented at the meeting of the National Council on Family Relations Conference, Vancouver, British Columbia.
- Henry, R. G., & Miller, R. B. (2003, October). *Problems across the marital life cycle*. Poster presented at the meeting of the American Association for Marriage and Family Therapy, Long beach, CA.
- Henry, R. G. (2003, October). *Differences, disagreements, and disappointments in late-life marriages: Clinical applications*. Paper presented at the meeting of the AMCAP Conference, Salt Lake, UT.
- Henry, R. G., & Miller, R. B. (2002, October). *Marital problems occurring in midlife*. Paper presented at the meeting of the National Council on Family Relations Conference, Houston, TX.

State and Local Meetings

- Henry, R. G. (2000, April). Family caregivers peer discussion. Round table presented at the meeting of the Alzheimer’s Association, Tampa, FL. [Invited presentation].

PROFESSIONAL ORGANIZATIONS

American Association for Marriage and Family Therapy	
Clinical Member	2006 - present

HONORS AND AWARDS

Sigma Phi Omega National Academic Honor and Professional Society in Gerontology	2000
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APPENDIX D: Faculty CVs

REVIEWER ACTIVITIES

Federal Grant Review Committees

Center for Mental Health Services, SAMHSA

National Child Traumatic Stress Initiative I (SM 05-004)	2005
Targeted Capacity Expansion Initial Review Committee (TI-04-003)	2004
Access to Recovery Initial Review Committee (TI-04-009)	2004

TEACHING

University of Florida

RCS 6803	Counseling Practicum I
RCS 6930-905	Family Therapy, Theory, & Techniques
RCS 6930	Dynamics of Marriage and Family Therapy
RCS 6803	Counseling Practicum II MFT
RCS 5020	Foundations of Mental Health Counseling

Brigham Young University

HFL 224	Marital Enrichment
MFHD 240	Introduction to Parenting
Nursing 290 Lab	The Nurse-Client Relationship
MFHD 356 Lab	Communication Skills for Marriage, Family, and Human Development

COMMUNITY SERVICE

Serving as the President of the Tampa Bay EFT community 2018-present.

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APPENDIX D: Faculty CVs

Lauren A. Baxley, Ph.D., LMFT

6321 Voyagers Place

Apollo Beach, FL

33572 419-410-5919

Baxley.Lauren@gmail.com

Education

- 2012 The Florida State University, Ph.D., Marriage and Family Therapy (COAMFTE Accredited)
Dissertation: *The Relationship Between Childhood Bullying Victimization and Social Competence in Emerging Adulthood*
- 2009 Nova Southeastern University, M.S., Marriage and Family Therapy (COAMFTE Accredited)
- 2007 The Ohio State University, B.S., Human Ecology

Clinical Employment

- 2014 – Present **Licensed Marriage and Family Therapist**
- 2018 – Present **Florida Approved Supervisor – LMFT & LMHC**
License Number: MT 2875
- 2013 – Present **Marriage and Family Therapist – Mental Health Outpatient Clinic James A. Haley Veterans Hospital, Tampa, Florida**
- Provide couple and family therapy for veterans and their families facing a variety of challenges.
 - Serve as co-chair of the Family Service Task Force, which assists in creating a more family friendly environment and treatment approaches.
 - Promote couple and family services throughout hospital and outlying community based outpatient centers.
 - Engage in effective collaboration and consultation with other providers for veterans participating in multiple mental health treatments simultaneously.
 - Collect and maintain appropriate community referral sources for non-veteran spouses and family members.
 - Provide adjunct supervisory experience for family therapy intern students.
 - Utilize family therapy theories and evidence based practices, interventions, and assessment tools to assist clients in achieving desired change.

APPENDIX D: Faculty CVs

- Serve as the Family Services representative for community outreach efforts.

2013

EBD Therapist – EBD Outreach Program
Gracepoint, Tampa, Florida

- Provided in-school therapeutic intervention for students and their families who have emotional and behavioral disabilities.
- Engaged in on-site crisis management; including psychiatric evaluations and appropriate recommendations.
- Acted as liaison for client and their family related to medication management and community services.
- Developed community partnerships for ease in warm hand- offs when making community referrals.
- Collaborated with school social worker, teachers, and ESE specialist to provide community resources and appropriate mental health referrals to students and families.

2012 -2013

Crisis Response Therapist- Children’s First Response Team
Mental Health Care, Inc., Tampa,
Florida

- Provided in-home intensive therapeutic intervention for children and families with allegations of child abuse or neglect.
- Utilized psycho-education and evidence based practices, interventions, and assessment tools to assist clients struggling with parenting, adolescent/child behavior problems, family and couple relationships, and substance abuse.
- Developed connections with various community partners throughout Hillsborough county for appropriate after-care referrals.
- Independently created and executed treatment plans, conducted safety and needs assessments, and provided appropriate community referrals.
- Participated in weekly supervision and case staffing meetings, as well as engaged in effective collaborative professional relationships.
- Completed paperwork and progress notes using an electronic medical records system in a timely manner.

2011- 2012

Marriage and Family Therapist - Cheer Counseling
Brandon, Florida

- Provided individual and family therapy for clients

APPENDIX D: Faculty CVs

struggling with a variety of issues including: parenting, post-traumatic stress disorder, adolescent/child behavior problems, DCF involvement, military family issues, financial difficulties, bereavement, family relationships, couple relationships, substance abuse, and employment.

- Utilized evidence-based practices, interventions, and assessment tools.
- Independently created and executed treatment plans and coordinated clinical services across providers.
- Provided intensive crisis counseling for children and families as well as on-going evaluation.
- Participated in weekly supervision sessions.

2009 – 2011

Marriage and Family Therapist - The Center for Couple and Family Therapy, The Florida State University, Tallahassee, Florida

- Provided individual and family therapy to clients from a variety of ages and developmental levels.
- Utilized evidence based treatment techniques with clients with varying emotional, physical, cognitive, and developmental struggles.
- Completed and implemented treatment plans on an individual basis.
- Provided clinical recommendations to various agencies upon request.
- Maintained current client records and completed progress notes in a timely manner.
- Participated in treatment teams for case conceptualization.

Teaching Experience

Spring 2015

Guest Lecturer
University of South Florida
Psychiatry Resident Family Therapy Training

Spring 2014

Adjunct Professor University of South Florida
Courses Taught:
Stress and Resilience. FAD 3432 (Live and Online)

2010-2011

Teaching Assistant (**with sole responsibility for class instruction**)
The Florida State University
Courses Taught:
Stress and Resilience. FAD 3432 (Online and Live)

APPENDIX D: Faculty CVs

Individual and Human Development across the Lifespan. FAD
3220 (Online)
Child Growth and Development FAD2220 (Online)

Research Experience

2010 – 2012

Research Team Leader, Florida State University

Duties:

Designed qualitative and quantitative research studies.
Supervised data collection and provided quality assurance.
Analyzed and interpreted data.
Assisted in collaborative writing and prepared to submit for
publication.
Maintained healthy work environment and productivity levels.

2011 – 2012

Research Team Member, Florida State University

Duties:

Engaged in collaborative writing among research team members.
Reviewed relevant literature and submitted necessary revisions.
Submitted manuscripts for publication.
Submitted current research for local, state, and national
presentations.

2010

Intern, Florida Department of Education

Duties:

Reviewed and approved public school district bullying policies.
Created model bullying reporting and investigation procedures.
Provided valuable clinical viewpoint to state bullying discussions.
Developed plan to evaluate program outcomes for various
counties.

2010

Bullying Task Force Member, Leon County Public Schools

Duties:

Created and implemented anti-bullying programs.
Researched effective anti-bullying programs and contributed
findings.
Developed protocol to evaluate program outcomes.

2005-2007

Research Team Member, Ohio State University

Duties:

Entered qualitative and quantitative data.
Assisted in coding qualitative data.
Performed quality assurance checks.
Attended research team meetings and prepared data entry reports.

Publications

***Dr. Baxley's research and publications are also published under the last name, Fortner.

Rivers, J., Mullis, A., **Fortner, L.**, & Mullis, R. (2012) Relationships between parenting styles

APPENDIX D: Faculty CVs

and the academic performance of adolescents. *Journal of Family Social Work, 15, 202-216.*

Professional Presentations

Baxley, L., Powell, S. (August 2018). Family Therapy: Understanding the Value and Creating Opportunity. Presentation at the Mental Health and Behavioral Sciences Service Grand Rounds in Tampa, Florida.

Fortner, L. (November, 2011). Bullying: Attitudes Among Future Professionals. Presentation for the annual conference of the National Council on Family Relations in Orlando, Florida.

Fortner, L. (September, 2011). Bullying: Necessary Support and Implications for Therapists. Presentation at the American Association of Marriage and Family Therapy National Conference in Fort Worth, Texas.

Fortner, L., Olmstead, S., Cobb, R., Pilkington, S., & Pasley, K. (November, 2010). College Students and Contraception: Deciding, Using, and Discussing. Poster presented at the annual conference of the National Council on Family Relations in Minneapolis, Minnesota.

Supervision Experience

2018	Florida Approved Supervisor
2014 – Present	Providing on-site supervision to family therapy psychology interns on an as needed basis
2014 – Present	Providing systemic therapy consultation to mental health providers at the VA
2010	Supervision in Training, Florida State University
	<u>Duties:</u>
	Developed and maintain supervisor-supervisee relationship
	Provided on-going weekly clinical supervision to promote professional growth.

Honors and Awards

Spring 2012	Dissertation Grant Award
Spring 2011	Member of the Glenn Society
Spring 2011	Outstanding Teaching Assistant Award Nomination
Spring 2011	Phi Kappa Phi National Honor Society
Spring 2010	Kappa Omnicron Nu National Honor Society
Spring 2010	Certificate in Online Mentoring and Instruction
Fall 2009	Program for Instructional Excellence Certificate

Professional Membership and Service

2007 – Present	Florida Association of Marriage and Family Therapy (FAMFT)
2007 – Present	American Association of Marriage and Family Therapy (AAMFT)
2010 – 2015	Abstract Reviewer, National Council on Family Relations (NCFR)
2010 – 2015	National Council on Family Relations (NCFR)
2012 – 2013	Treasurer- (TBAMFT) Tampa Bay Association for Marriage and Family Therapy

Agenda Item: FL 115

USF Board of Trustees
December 3, 2019

Issue: B.S. Personal Financial Planning – CIP 52.0804

Proposed action: Approval

Executive Summary:

The undergraduate Personal Financial Planning program aims to equip students with the knowledge and skills needed to pursue careers in the financial planning and related industries. A relatively young profession, financial planning emerged as a unique discipline about 30 years ago. The emphasis in this program is on applying and synthesizing financial planning concepts and techniques to a client's circumstances and developing a course of action based on accepted financial planning methods.

Financial Impact:

There will be no financial impact because existing faculty and resources will be reallocated for this new degree program.

Strategic Goal(s) Item Supports:

Strategic Plan Goal 1: Well-educated and highly skilled global citizens through our continuing commitment to student success.

BOT Committee Review Date: November 20, 2019

Supporting Documentation Online (please circle):

Yes

No

USF System or Institution specific: University of South Florida

Prepared by: Jianping Qi, Ph.D., Chair 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

University Submitting Proposal

Summer 2020

Proposed Implementation Term

Muma College of Business

Name of College(s) or School(s)

Kate Tiedemann School of Business and Finance

Name of Department(s)/ Division(s)

Personal Financial Planning

Academic Specialty or Field

B.S. in Personal Financial Planning

Complete Name of Degree

52.0804

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	95	76	\$3,014	\$229,052	\$0	\$0	\$246,602
Year 2	108	86					
Year 3	127	102					
Year 4	155	124					
Year 5	191	153	\$1,598	\$244,546	\$0	\$0	\$262,096

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 proposed Bachelor of Science in Personal Financial Planning (B.S./PFP) is a 120-credit hour undergraduate program. The USF B.S./PFP aims to equip students with the knowledge and skills needed to pursue careers in the financial planning and related industry. A relatively young profession, financial planning emerged as a unique discipline about 30 years ago. Distinguishing it from other financial professions is its basic philosophy: financial planning is a process, not a product. It is the process of determining how an individual can meet life goals through the proper management of his or her financial resources. A financial planner takes a “big picture” view of a client’s financial situation and makes financial planning recommendations based on the client’s needs in areas such as budgeting and saving, taxes, investments, insurance and retirement planning. Alternatively, the planner may work with a client on a single financial issue but still within the context of that client’s overall situation.

a. **Level:**

The degree program is a B.S. in Personal Financial Planning (PFP) in USF’s Muma College of Business. It will be offered under CIP 52.0804.

b. **Emphasis:**

The program’s emphasis is a major in Personal Financial Planning that focuses on analysis of data and critical thinking with regard to the client’s circumstances. There are no formal concentrations, tracks or specializations.

c. **Total Number of Credit Hours:**

120 credit hours.

d. **Overall Purpose:**

The ultimate purpose of this program is to prepare students to sit for the Certified Financial Planner (CFP®) exam. To determine demand, USF created a major in Personal Financial planning under the finance CIP code 52.0801. The USF Muma College of Business has registered the current Personal Financial Planning major with the CFP Board, allowing students to meet the educational requirements to sit for the CFP® exam. The new Personal Financial Planning program, offered under CIP Code 52.0804, will maintain the registered program status with the CFP Board. The CFP® mark is recognized as the gold standard in the industry. Students graduating with a B.S./PFP will find jobs in Financial Analysis, Financial Management, Investments, Financial Sales, Banking and Lending, Accounting and Accounting Support according to Burning Glass. Burning Glass lists the top fifteen employers in the nation hiring students with this major as Bank of America, JP Morgan Chase Company, U.S. Bancorp, H&R, The PNC Financial Services Group, Inc., Wells Fargo, PricewaterhouseCoopers,

Citi, Accenture, Deloitte, Regions Financial Corporation, Huntington National Bank, BB&T Corporation, Citizens Financial Group, and Fifth Third Bank (Appendix E).

More than an educational designation, the CFP® certification is a professional credential that helps to set apart those serious about a career in financial planning. The CFP® certification was first launched in 1973, and it took 27 years for the CFP® certificants to reach 10% of all advisors in 2007. It only took 11 years (until around 2011) for the percentage to go from 10% to 20% and now, seven years later, CFP® certificates' make up 30% of all advisors. If growth continues at this rate of acceleration, it is expected that 50% of all advisors will be CFP® certificants. Consumer demand for competent financial planners has driven this growth. There are currently more than 82,000 CFP® professionals in the United States and another 75,000 plus professionals outside of the U.S. The rigorous certification standards are updated regularly to reflect current needs of practitioners and their clients and have become the bedrock for the financial planning profession.

- 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 Academic Program Coordination Workgroup reviewed the pre-proposal during their April 6, 2018 meeting and no concern was expressed.

- 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 offered at the doctoral level.

- 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./PFP program directly supports the following high-level SUS Strategic Planning goals in teaching and learning; community and business engagement (indicated by the double asterisk) and indirectly supports a Scholarship and Research goal (indicated by the single asterisk):

STATE UNIVERSITY SYSTEM GOALS	EXCELLENCE	PRODUCTIVITY	STRATEGIC PRIORITIES
TEACHING & LEARNING	** Strengthen Quality & Reputation of Academic Programs and Universities	** Increase Degree Productivity and Program Efficiency	Increase the Number of Degrees Awarded within Programs of Strategic Emphasis

SCHOLARSHIP, RESEARCH & INNOVATION	* Strengthen Quality & Reputation of Scholarship, Research, and Innovation	* Increase Research Activity and Attract More External Funding	Increase Commercialization Activity
COMMUNITY & BUSINESS ENGAGEMENT	**Strengthen Quality & Recognition of Commitment to Community and Business Engagement	**Increase Community and Business Engagement	** Increase Community and Business Workforce

TEACHING AND LEARNING
EXCELLENCE
<p>The Certified Financial Planning Board has begun to collect registered program data and the Financial Planning Journal is actively promoting the top schools. Over the next five years it is anticipated that a nationally acknowledged ranking and awards will emerge. The goal for USF will be to be listed among the top 10 schools.</p>
<p>In Spring 2018, the PFP major was granted registration with the CFP Board. According to the CFP Board, the average pass rate for the CFP® exam is 67% for first time test takers. Although exact data is not available, the average for university students is lower than for CFP® certificate programs offered to older adults as career changers. The goal for USF is to achieve a 70% pass rate by providing scholarships to incentivize adequate exam preparation. Further, we are developing a four-day boot camp program in collaboration with the University of Tampa to increase student pass rates. In December 2018 the first six students graduated with a Personal Financial Planning degree but to-date none have sat for the CFP® exam.</p>
PRODUCTIVITY
<p>USF/Tampa is a Florida Preeminent Research University. As a recipient of this prestigious designation, USF is committed to the highest level of program productivity and efficiency with a 90% or higher freshman retention rate and a 60% or higher four-year graduation rate. Currently, no other Preeminent Research University offers a B.S./PFP. The PFP program at USF will ensure completion of first-time in college students in a timely manner. Upon graduation students will have satisfied two goals: 1) earned a university degree while simultaneously 2) satisfying the educational requirement to sit for the CFP® exam. This additional incentive prepares students to “hit the ground running” in a financial services career. Students are incentivized to achieve both goals since the alternative is to return to school to earn the certificate that allows them to sit for the CFP® exam. Most certificate programs range between one and two years and could cost another \$5,000. Preparing for the CFP® while achieving a baccalaureate degree is an efficient and effective way to become a top performer in the industry.</p>

We expect the PFP degree program to build upon the diversity of undergraduate student population in the USF Muma College of Business' Kate Tiedemann School of Business and Finance where the percentage of enrolled (Spring 2019) underrepresented minority (URM) students is 7% Black, 18% Hispanic, and 29% women. These numbers are much higher than the Financial Services industry average.

The goal is to increase these numbers even further. The Certified Financial Planning Board has declared the numbers in the industry for women (23%) and minorities (2%) as unacceptable. USF has begun participating in diversity initiatives to attract African American & Hispanic (and female) students into the program. The program director serves as an ongoing speaker for several diversity initiatives where students are invited to attend. In Fall 2018, scholarship funds were raised to send one diverse student to the first CFP® Diversity event in NYC. African American students were invited in Spring 2019 to participate in a Raymond James Black Network initiative. These efforts support the State University System strategy and will favorably impact the industry where the current national average for African Americans and Hispanics is below 2% and for women is 23%.

Additionally, as career changers recognize the value of a college degree and the PFP curriculum, this program will be instrumental in attracting more adult learners to USF. Currently 17% of PFP majors are 25+ years old. This number will grow as the program gains in awareness.

The following (SUS) Strategic Planning performance indicators demonstrate how the PFP program directly and indirectly supports these goals:

SCHOLARSHIP, RESEARCH AND INNOVATION
EXCELLENCE
Several undergraduate students have pursued research in PFP related topics such as student loan debt behavior and financial literacy. Research opportunities in this new field are abundant and widely sought. Quality publications looking for peer-reviewed scientific research are (1) Journal of Financial Planning, (2) Journal of Personal Finance, (3) Journal of Financial Counseling and Planning, (4) Financial Services Review, (5) Journal of Consumer Affairs, (6) Journal of Financial Service Professional and (7) Journal of Financial Therapy. There are numerous grant opportunities due to the direct impact on the well-being of the individual, the household and society.
PRODUCTIVITY
Topics in Personal Finance are often related to social issues particularly around financial literacy and financial well-being. There are many opportunities to apply for grants and other funds from corporate sponsors to conduct research. The goal for the PFP program at USF is to apply for five major grants by 2025.
COMMUNITY AND BUSINESS ENGAGEMENT
EXCELLENCE
PFP students understand the importance of financial empowerment and its impact on people's lives. Students are involved in peer-to- peer counseling and have already begun reaching out to the community to participate in financial literacy month (April) working with the Financial Planning Association (FPA) to participate in a "financial literacy" community event hosted by the Pasco County School District. In Fall, 2019, the PFP program students, supported by the Financial Planning Association (FPA) and the USF HR department, will be conducting financial literacy classes every month for staff and students. As the PFP program develops, community outreach will be the cornerstone, providing service- learning opportunities for students while simultaneously addressing a critical social need in the surrounding community.
PRODUCTIVITY

Book knowledge is not enough to prepare students for this applied profession. The PFP program unites the “knowing” and “doing,” with a collaboration between faculty and professionals to ensure career-preparedness. Students are immersed in the profession, attending conferences and participating in competitions, internships and the financial planning club. They are matched with mentors and receive instruction from surrogate teachers from the profession.

STRATEGIC PRIORITIES

Florida needs competent and ethical financial planners. Many Florida employers such as Raymond James Financial, a major financial services company headquartered in St. Petersburg Florida are anxious to hire USF PFP graduates. As students are encouraged to develop relationships with local employers, this will help retain this valuable talent in the state of Florida.

According to the U.S. census (<http://worldpopulationreview.com/states/>-July 2019), Florida is the third most populated state in the nation and has the second largest group of retirees according to Social Security (<https://www.businessinsider.com/social-security-retirement-benefits-by-state-2018-4> - July 2019). Without earned income, these individuals are concerned about health care, inflation, long-term care and running out of money in retirement and have been shown to be twice as likely to feel confident about retirement savings if they have an adviser (<https://myirionline.org/docs/default-source/research/boomer-expectations-for-retirement-2014-web-version-final.pdf?sfvrsn=0&sfvrsn=0> -- June 2019).

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:
 - o Education
 - o Health
 - o Gap Analysis
2. Economic Development:
 - o 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](#).

Currently CIP code 52.0804 is not approved as a Program of Strategic Emphasis. However, the BOG staff has compiled a list of potential CIP codes to be added to the Programs of Strategic emphasis. CIP Code 52.0804 is being proposed in the GAP Analysis category under Critical Workforce.

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 B.S./PFP program, like all other programs, will be offered by the Muma College of Business at any of its sites for which there is sufficient student demand. The BS/PFP program is homed in the Muma College of Business’ Kate Tiedemann School of Business and Finance, located on the St. Petersburg 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.

The independent financial advisor industry is positioned for continued bullish growth well into the next decade (<https://www.financial-planning.com/slideshow/rias-bullish-on-growing-revenue-aum-and-clients-in-2018> -- June 2019). Independent advisor growth points to a shift in consumer expectations and demand for transparent and fiduciary driven advice (https://content.schwab.com/web/retail/public/about-schwab/schwab_iaos_wave26_results_0619-9LVH.pdf -- June 2019). Meeting and sustaining quality growth will require young staff and entrepreneurs who are qualified and prepared to meet the challenges of the financial planning profession. To succeed and thrive, independent financial advisors must create direct pipelines to talented and driven students from high caliber degree-based financial planning programs.

NEED/DEMAND FOR PERSONAL FINANCIAL ADVISORS and CERTIFIED FINANCIAL PLANNERS OVERALL**National Demand and Employment:**

According to the Bureau of Labor Statistics, Occupational Handbook (<https://www.bls.gov/oes/current/oes132052.htm#st> - July 16, 2019), Personal Financial Advisors are expected to grow by 15% which is much faster than most occupations. Compare this growth to budget analysts (7%), financial analysts (11%), securities, commodities and financial services sales agents (6%) and accountants and auditors (10%).

The median annual wage for personal financial advisors was \$88,890 in May 2018 (Table 1). The lowest 10 percent earned less than \$41,590, and the highest 10 percent earned more than \$208,000. In May 2018, percentile wage estimates for personal financial advisors were as follows:

Table 1: National Profile

Percentile	10%	25%	50% (Median)	75%	90%
Hourly Wage	\$19.99	\$27.54	\$42.73	\$75.82	Equal to or greater than \$100.00*
Annual Wage**	\$41,590	\$57,290	\$88,890	\$157,710	\$208,000

Source: <https://www.bls.gov/oes/current/oes132052.htm#st> - May 2018

*According to the above mentioned website "this wage is equal to or greater than \$100.00/hour or \$208,000/year.

** "Annual wages have been calculated by multiplying the hourly mean wage by a "year-round, full-time" hours figure

of 2,080 hours; for those occupations where there is not an hourly wage published, the annual wage has been directly calculated from the reported survey data.”

Florida is among the states showing the highest employment level in personal financial advisors.

Table 2: States with the highest employment level in this occupation

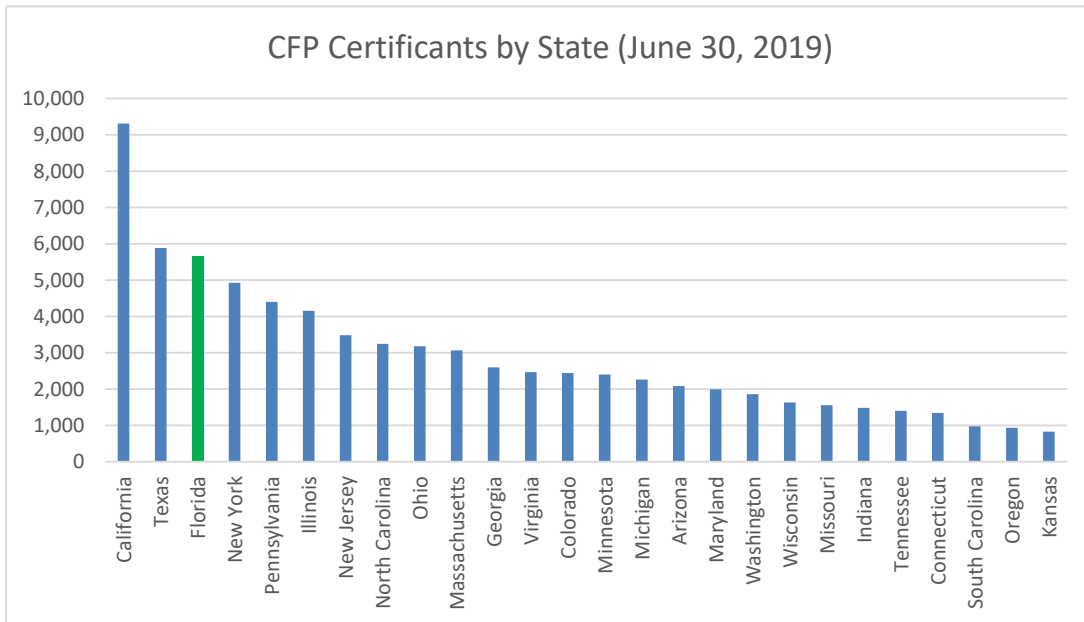
State	Employment	Employment per Thousand Jobs	Annual Mean Wage
New York	26,710	2.85	\$164,260
California	24,890	1.46	\$128,730
Florida	14,080	1.64	\$122,840
Texas	10,830	0.89	\$110,820
Massachusetts	9,060	2.54	\$128,140

Source: <https://www.bls.gov/oes/current/oes132052.htm#st> - May 2018

State Demand:

Table 2 demonstrates Florida has the third highest level of employment for personal financial advisors. This statistic also holds for the number of Certified Financial Planner (CFP®) certificants. As of June 2019 there are 84,438 CFP® certificants throughout the nation with 5,643 in the state of Florida (see Chart 1). Demand exists for CFP® certificants given Florida has the third largest population of CFP® certificants to service the second largest population of retirees in the nation. Population growth continues in Florida, indicating that the need will exist into the future.

Chart 1: CFP® Certificants by the Top 25 States – June 30, 2019

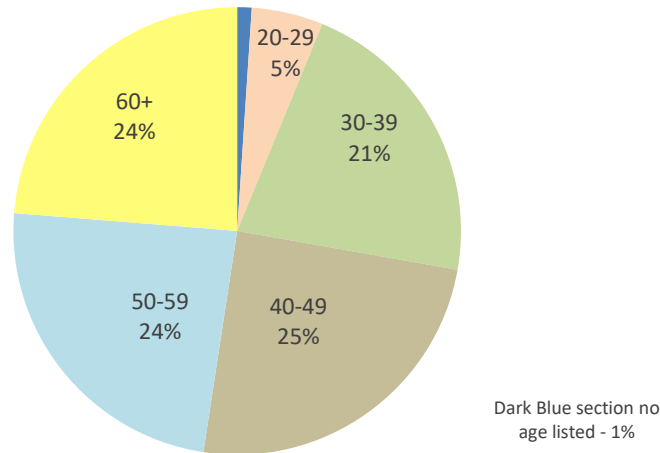


Source: CFP Board <https://www.cfp.net/news-events/research-facts-figures/cfp-professional-demographics> - June 30, 2019

The age demographics of current CFP® certificants highlights even further opportunity for the new

CFP® entrants (see Chart 2). While 24% of CFP® certificants are over the age of 60 and close to retirement, only 5% of new planners are available to take their positions, assuming no growth in demand. With the approval of the USF degree program, the state of Florida would have only two programs that could service the increasing demand for CFP® certificants.

Chart 2: CFP® Certificants by Age Group



Source: CFP Board <https://www.cfp.net/news-events/research-facts-figures/cfp-professional-demographics> - June 30, 2019*

*Percentages are based only on those who have responded to this question from the CFP Board.

Local Demand:

According to Burning Glass data, Financial Planning and Services careers are poised to grow over the next 8 years in Tampa-St. Petersburg-Clearwater by 20.72%, similar to the state of Florida (see Chart 3) which is expected to grow by 20.15% and well over the national average (Appendix E). Burning Glass data shows, Financial Planning and Services careers make up 12.8% of the total labor market in Tampa. Over the past year, 56% of job postings in the Tampa region have been in the Finance and Insurance Industry (see Chart 4).

Chart 3: Employment Trend in Florida for this Program (Employment data between years 2019 and 2028 are projected figures).

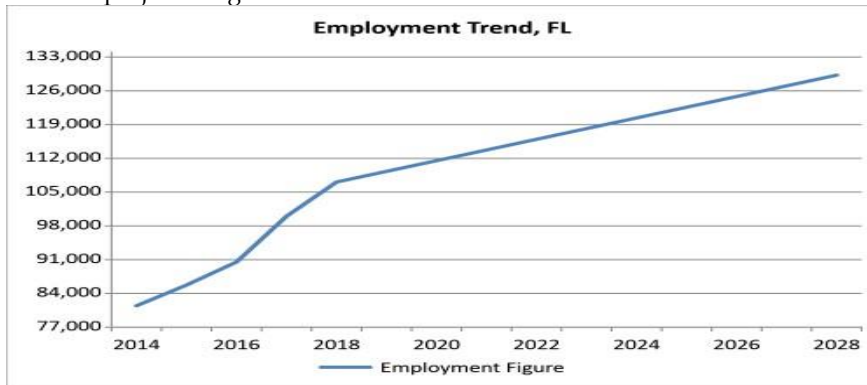
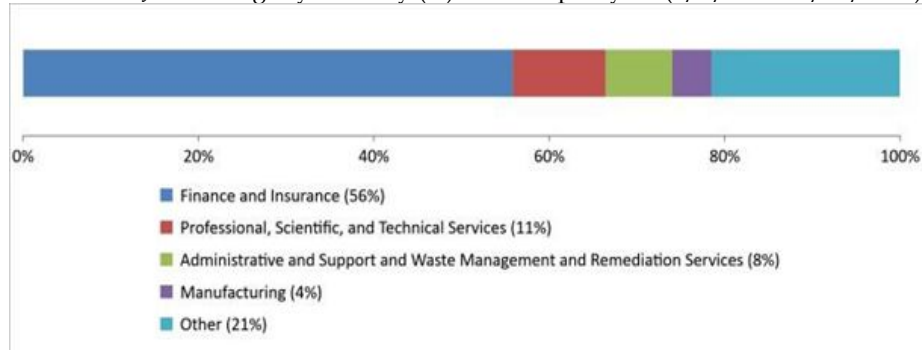


Chart 4: Job Postings by Industry (%) over the past year (7/1/2018 - 6/30/2019)



Two letters from top national associations: the Financial Planning Association, representing over 22,000 financial advisors and the National Association of Personal Financial Advisors, representing over 3,000 financial advisors, describing the need for Personal Financial Advisors can be found in Appendix C. Also included in Appendix C is a letter from the primary major financial services organization headquartered in Florida, Raymond James.

Consumer Demand

A report by ORC International on, "Investor Preferences in Selecting a Financial Advisor" presents the findings of a survey fielded in November 2014 from a sample of 850 U.S. investors (<https://www.cfp.net/docs/default-source/news-events---research-facts-figures/cfp-board-investor-preference-survey-orc-international-2014-12.pdf> - June 2019).

U.S. investors have begun to recognize the value of educated, certified financial advisors. Investors responding to the survey prefer breadth of knowledge and certification backed by examination when selecting a financial advisor.

- Four out of five (81%) prefer an advisor who takes all areas of their financial life into account as opposed to someone who only specializes in one or two areas.
- Nearly 90% of respondents see a potential advisor's certifications as important, with three-fifths saying they are very important.
- Education alone is not enough. Eighty-six percent of investors responding to the survey prefer an advisor who has passed a certification exam in addition to a rigorous education program.
- Most (82%) say it is important for a potential advisor to discuss his or her training and certifications. Thirty-nine percent say that it is very important an advisor do so before he or she is engaged.

Demand for CFP® Professionals Drives Wages

CFP® certification is particularly important for firms that seek to attract wealthy investors who often require access to expertise across multiple wealth management areas. A study done by Aite Group in 2016, Building a Wealth Management Practice: Measuring CFP® Professionals' Contribution (<https://aitegroup.com/report/building-wealth-management-practice-measuring-cfp%C2%AE-professionals-contribution> - June 2019), identifies and quantifies differences between

registered representatives and investment advisor representatives (collectively referred to as “financial advisors”) who hold a CFP® certification and financial advisors who are not CFP® professionals.^{vi} In the study, personal financial advisor’s practices were grouped into one of two types of practices:

- **Team-based practices:** Practices with more than one client-facing advisor
- **Solo practices:** Practices with one lead client-facing advisor

Across solo practices, CFP® professional practices generate 40% more revenue based on average practice revenue and almost 70% more revenue per client than non CFP® professionals. The median revenue of a solo practice led by an advisor who is not a CFP® professional is \$250,000, while the median revenue of solo CFP® professional practices is \$350,000 (Figure 1), 80% higher.

Figure 1: Solo Practice Revenue and Revenue per Client



Source: Aite Group’s survey of 403 U.S. financial advisors, October 2015 The median revenue of solo practices without CFP® professionals does not change among advisors with at least 12 years of industry experience, while median revenue jumps to \$450,000 for CFP® professional practices with similarly experienced advisors (Figure 2). This large difference among experienced advisors indicates that CFP® professionals can grow revenue at a faster pace than other advisors throughout their careers.

Figure 2: Solo Practice Revenue and Revenue per Client – Experienced Advisors



Source: Aite Group’s survey of 403 U.S. financial advisors, October 2015

Results are similar across team practices. CFP® professional teams are 44% more productive, and revenue per client at CFP® professional practices is almost double that of non CFP® professional practices (\$2,406 versus \$4,745; Figure 3).

Figure 3: Team Practice Revenue and Revenue per Client



Source: Aite Group's survey of 403 U.S. financial advisors, October 2015

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 Fall 2017, the Muma College of Business started the major in Personal Financial Planning (PFP) under the Finance CIP Code (CIP 52.0801). As of January 2019, more than 83 students are enrolled in the major.

Comparable majors throughout the country offer further evidence of student demand. Universities all over the country are recognizing this growing profession and the opportunity it creates for their students. July 26, 2016, Financial Planning magazine published the 75 leading schools for planners (<https://www.financial-planning.com/news/75-leading-schools-for-planners> - July 2016). These schools were all registered with the CFP Board. In 2018, the number of schools jumped to 102 (<https://www.financial-planning.com/list/colleges-for-financial-planning> - October 1, 2018). According to the Financial Planning magazine, 31 of the schools are located in the Northeast, 29 in the Midwest, 13 in the West and 29 in the South. In the Southern part of the country, only two, University of North Florida and University of South Florida, are located in Florida compared to nine programs located in Texas. Although Florida's estimated population (21.7M) is 24% less than Texas (28.7M) according to the US Census, 17.3% (3.8M) of the population in Florida is over the age of 65 versus Texas where 10.6% (3M) are over the age of 65, resulting in more senior adults potentially requiring financial advice during a time where they are no longer receiving income. These demographics illustrate the need for more personal financial planning programs in the state of Florida (see Figure 4).

Figure 4: Locations of schools offering CFP Registered Degree Programs in the South



- 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.

University of North Florida (UNF), Jacksonville, Florida offers a CFP Board-registered program with a B.B.A. in financial services. The current program enrollment is 119. It has an active Financial Planning Association (FPA) student chapter. We have been in discussions with UNF on how we may collaborate. Please see Appendix C for a letter of support from UNF.

Florida State University (FSU) is developing a B.S. in Financial Planning and Services in its College of Applied Studies in Panama City. FSU submitted a pre-proposal in spring 2018. We have spoken to them and continue to remain in contact. We have been in discussions with FSU, communicating with Amy S. Polick, Ph.D., BCBA-D, Associate Dean for Academic Affairs at FSU Panama City and College of Applied Studies to discuss how we can collaborate. To satisfy a strong demand for financial planners, we believe the USF, UNF and FSU programs can coexist with somewhat different approaches.

- 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.

The proposed Personal Financial Planning degree program will replace the existing undergraduate major in Personal Financial Planning which currently has an enrollment of 83 students. We expect 50 of those students to switch to the new degree program in Year 1. Following the current student demographics of the Kate Tiedemann School of Business and Finance at the USF Muma College of Business, in the first year we also expect 25 students to be First Time in College (FTIC) students who enter as freshman, another 10 students to be transfer students from the Florida College System, and some (five students each) from other Florida colleges and universities and from outside the state. Since the industry demand is high, we expect new FTIC enrollment to increase at a rate of 30% per year as student awareness increases and student demand catches up to industry demand.

- 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.**

Neither Florida Agricultural and Mechanical University (FAMU) nor Florida International University (FIU) offers a B.S. in Personal Financial Planning.

USF is committed to engaging under-represented and minority students in our programs. We strongly value equal access to education, ethical development, and all aspects of diversity (cultural, religious, race and ethnicity, socio-economic, linguistic, gender, sexual orientation, etc.). These shared institutional values provide a supportive environment to foster interaction and engagement among students who will shape their organizations' business interactions and transactions with diverse audiences.

The goal is to increase further all aspect of diversity. Specific to the personal financial planning program, the Certified Financial Planning Board has declared the numbers in the industry for women (23%) and minorities (2%) as unacceptable. At USF, we have begun participating in diversity initiatives to attract African American & Hispanic and female students into the program. The program director serves as an ongoing speaker for several diversity initiatives where students are invited to attend. In Fall 2018, scholarship funds were raised to send one diverse student to the first CFP® Diversity event in NYC. African American students were invited in spring 2019 to participate in a Raymond James Black Network initiative. With this proactive effort, we expect the enrollment in the B.S./PFP will mirror or even exceed the gender/ethnic diversity of the Muma College of Business.

Muma College of Business Spring 2019 Undergraduate Enrollment

	Male	Female	Total
American Indian	5	3	8
Asian	150	155	305
Black	188	158	346
Hispanic	475	408	883
Native Hawaiian or Other Pacific Islander	6	0	6
Non-Resident Alien	320	221	541

Not-Reported	83	73	156
Two or More Race	87	58	145
White	1,327	823	2,150
Grand Total	2,641	1,899	4,540

To ensure the desired outcome for student diversity, recruiting efforts will have a broad statewide reach, extending to geographic regions including those having populations of under-represented prospective students. Prospective students will be identified at key high schools with personal financial planning programs. Outreach approaches will also include collaboration with the USF Office of Veteran Success. Many military veterans have work experience and are well-equipped to undertake a degree in personal financial planning. Departmental efforts to recruit and retain URM students will directly support the SUS mission to increase these numbers and will increase the USF PFP degree program's visibility in the industry's nationwide campaign to increase these numbers.

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.)**

As listed in Appendix A-Table 4, four of our current faculty members will be teaching in the new degree program. The salary funds of existing members, in proportion to their teaching commitment to this program will be reallocated to the B.S./PFP program, as listed in Table 3. This is a reallocation of \$204,159 from the existing major to the new program and is increased by 7% to \$218,450 in Year 5. A 7% increase is also projected for A&P salaries.

Included in the budget (table 2) is \$7,000 under "Other Personal Services" for an adjunct faculty which will remain \$7,000 in year 5. Under "Assistantships & Fellowships" we have budgeted for a graduate assistant in year 1, \$15,000 (including health benefits) which will increase by 7% to \$16,000 in year 5. Given the industry and community engagement associated with the curriculum, we have budgeted \$17,550 under Philanthropy/Endowments in both year 1 and year 5 to go towards travel to local and national conferences, boot camps, CFP® preparation and instruction, advisory council meetings and student events. These funds will be sourced through donations from advisory council members. To date there is approximately \$144,000 collected from advisory council members and interested financial services firms committed to support the PFP degree in the foundation account.

- 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. USF has no plan to offer the program through continuing education.

- 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).

The faculty who will teach in the B.S./PFP program are members of the Kate Tiedemann School of Business and Finance at the Muma College of Business, which houses the current undergraduate PFP major that will be terminated when the B.S./PFP is introduced. The primary impact of the proposed program will be felt as a slight shift in faculty effort from finance and accountancy to the PFP courses. The B.S./PFP comprises of seven existing courses. Four are currently taught by existing finance faculty (i.e., Financial Planning Fundamentals, Personal Financial Planning Process and Development, Principals of Investments and Retirement Planning and Employee Benefits). Two are currently taught by existing Accounting faculty (i.e., Concepts of Federal Income Taxation and Estate Planning). The accounting courses are not restricted in that both accounting and PFP students are able to enroll in the courses.

- 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 is no increased need for general education or other prerequisite courses for this new degree program.

- 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.

Industry Associations: Work has been done to actively engage the following associations to gain support in terms of time and money. These associations have been very responsive where we have received various scholarships and funds for the foundation account. The primary associations are

- Financial Planning Association
- National Association of Personal Financial Planning Association
- Florida Securities Dealers Association
- CFP Board

Specific Firms: The Muma College of Business has worked to build associations and obtain resources from a number of local firms. The PFP program has received funds from the following firms:

- Raymond James
- Simon & Associates Wealth Management
- ESSEL FOUNDATION INC
- Northwestern Mutual
- USAA
- Bank of America
- BNY Mellon Wealth Management
- Fidelity Investments

- SunTrust Bank, Inc.
- T. Rowe Price
- Charles Schwab & Company, Inc.
- Sutton Wealth Advisors, Inc.
- Independent Financial Holdings Corp.
- Borrego Foundation, Inc.
- RBC Wealth Management
- Individual Supporters: Geoff Simon, Barbara Phethean, Victoria Boswell, James Stanger, Kevin O'Connell, Laura Mattia

Financial Technology Software: Currently we have negotiated and received use of the following software; however, there are numerous opportunities to develop other relationships and gather further access since technology companies foresee our students as future users of their products.

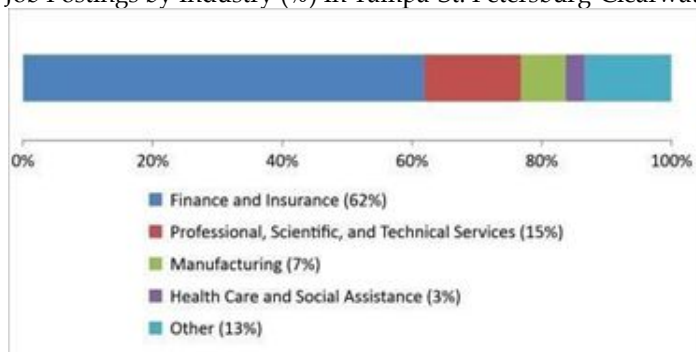
- Moneyguide Pro
- Morningstar
- Evaluator Portfolio Builder

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 Personal Financial Planning (PFP) program will focus its resources on the looming national and local shortage of Financial Advisors and Financial Planners. It will provide fundamental training in wealth management, financial and estate planning, portfolio analysis, sales, marketing, and interpersonal communications. This will create a qualified pool of talent for career opportunities in financial services in the Tampa Bay area and throughout Florida. According to Burning Glass data, the majority of job postings this past year in the Tampa-St. Petersburg- Clearwater area (see Chart 3 below) have been in the Finance and Insurance industry (62%). The next largest industry in Tampa Bay is Professional, Scientific and Technical Services with job postings of 15%. Within the broader state of Florida, postings for Financial and Insurance positions are slightly less than in the Tampa Bay area but still account for the majority of postings (58%). The PFP degree in the Muma College of Business will meet state economic and workforce needs and provide opportunities for community outreach.

Chart 3: Job Postings by Industry (%) In Tampa-St. Petersburg-Clearwater Area



Source: Burning Glass

As students recognize the opportunity for well-paying jobs through increased awareness and a growing program reputation, they will enter the university as FTIC students and will transfer from other Florida College System programs and other Florida colleges and universities not offering such a program. As shown in Appendix A, Table 1-A, by year 5, we expect 191 students to choose USF to pursue a degree in Personal Financial Planning.

The Muma College of Business will recruit students from across the country to participate in the program, attracting transfers from out of state colleges and universities. We expect to attract 25 students from around the country to the Personal Financial Planning program at USF in year 5. This will provide a well-trained local talent base in financial services to serve both Florida and the nation.

In 2016, approximately 700 students completed bachelor's degrees in financial planning from the 90 schools offering degrees, according to the U.S. Department of Education. This is fewer than eight students per school on average. We expect 12 students to graduate from the Personal Financial Planning program at USF in Year 1 and we expect that number to triple by Year 5 to 35 PFP graduates. Half of this anticipated growth is related to the industry's forecasted growth in the Florida market. The other half of the anticipated growth will be achieved as student demand and awareness catch-up to the growing and evolving profession.

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 total number of credit hours is 120 to earn the 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.

Following are the common prerequisites for CIP Code 52.0804, as listed in the 2018/2019 Common Prerequisite Manual. All State Mandated Common Course Prerequisites (or equivalents) require completion with a minimum grade of C- in each course.

Courses at USF	Courses at a Florida College System Institution
ACG 2021 Principles of Financial Accounting	ACG X021 or ACG X022 or (ACG X001 and ACG X011)
ACG 2071 Principles of Managerial Accounting	ACG X071 or ACG X301 or ACG X072
CGS 2100 Computers in Business	CGS X100 or CGS X100C or CGS X530 or CGS X570 or CGS X060 or CGS X531 or CGS X000 or IMS X000
ECO 2013 Economic Principles (Macroeconomics)	ECO X013
ECO 2023 Economic Principles (Microeconomics)	ECO X023
MAC 2233 Business Calculus	MAC X233
QMB 2100 Business and Economic Statistics	STA X023 or QMB X100 or STA X122

- 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. The University is not seeking Limited Access status for the PFP 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 because the program is not an 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 goal of the Personal Financial Planning Program is to provide a new breed of competent and ethical financial advisors prepared to serve Florida's citizens, their communities, and the state economy. The financial services industry is undergoing a major transformation so it is imperative

to focus on the financial advisor of the future, not the past. Academic rigor of the highest quality will be achieved by working closely with industry leadership and particularly the Certified Financial Planner Board of Standards, Inc. whose mission is to benefit the public by granting the CFP® certification and upholding it as the recognized standard of excellence for competent and ethical personal financial planning. The PFP degree in the Muma College of Business will meet state economic and workforce needs and provide opportunities for community outreach.

Well-educated and highly skilled global citizens through continuing commitment to student success

The emphasis of the PFP program is on applying and synthesizing financial planning concepts and techniques to client circumstances and developing a course of action based on accepted financial planning methods. Students are required to demonstrate critical thinking and the ability to evaluate important financial decision-making processes, integrating current economic conditions and current client data to analyze the client's unique circumstances. Honing students' skills through innovative pedagogical approaches and experiential learning opportunities will help students prepare for specific finance-related jobs in financial services, investments, and financial institutions, as well as for advanced study in personal finance.

In addition to major requirements, all students must complete the business core curriculum, which consists of a series of courses that provides a foundation of business knowledge necessary for all majors.

A highly effective, major economic engine, creating new partnerships to build a strong and sustainable future for Florida in the global economy

Partnering with the Financial Services Industry worldwide, the PFP program seeks to develop best practice solutions to meet the needs of Florida citizens. Working with an advisory council, industry leaders, industry associations and university programs around the world, the PFP program is pursuing various initiatives to enhance learning through conferences, competitions, mentorships, internships and residency opportunities for students to better prepare for their career, prior to graduation. With strong business relationships everyone wins: students, industry, and the community.

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 PFP program seeks to build on the strength of the Muma College of Business and the Collier Student Success Center where students plan their career and participate in workshops, corporate networking events, internships, and employment opportunities.

Faculty and students attend monthly meetings of Financial Planning Association, National Financial Planning Association, and Florida Security Dealers Association, and regularly visit local firms. The students also attend an array of conferences including conferences of these three associations, TD Ameritrade Linc, T3 Fintech conference and competition, such as the E- Valuator Asset Management (TEAM) University Challenge, the CFP Student Video Competition, T3 Fintech competition, and the FPA Financial Planning Challenge. There are many other opportunities such as this and we will continue to participate in these life- changing experiences.

The program leverages business engagement through an advisory council and engages local industry leaders to provide instruction, boot camps and workshops. Students are encouraged to get involved in Junior Achievement initiatives, Bulls-to-Bulls peer mentoring, and are working on

several initiatives for financial literacy month (April). For example, PFP students teamed up with the local Financial Planning Association chapter and the Stavrou Center to provide financial literacy awareness at the Pasco County Schools Financial Literacy Expos during the first week in April 2019. Additionally, PFP students organized an event to celebrate Money Smart to promote personal financial awareness, where they had an exhibit in the atrium of the Muma College of Business from 10:30am to 2:30pm, Monday through Thursday, April 1 - 4, 2019. Their goal was to answer questions other students had about their personal finances ([IRA](#), [401k](#), etc.) and to promote our PFP Program.

With a strong business foundation as part of the curriculum at the USF, Muma College of Business, students develop an understanding of business and management tenets applicable to working “in” or “on” a financial services business. Students are also introduced to the critical thinking and communication skills required to work with individuals and influence their success.

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 planning process for the B.S./PFP began with a request from executives who are members of the executive advisory board of the Muma College of Business. Subsequently, finance faculty took up the request to consider the resources needed to offer a B.S./PFP. An initial proposal was circulated amongst financial services professionals who agreed to form an advisory board. At the same time, the registration criteria to become a CFP Board Registered Program was reviewed. It was determined that the CFP® registration criteria would be used as a guideline for creating the coursework for the new degree program.

Since the nature of financial planning is interdisciplinary, we decided to use available resources from the Muma College of Business to efficiently create the PFP program. The Principal Knowledge Topics list based on the results of the CFP Board’s 2015 Job Analysis Study was used as the blueprint to create the curricular framework. This list is used to prepare the CFP® exam where each exam question is linked to a Principal Knowledge Topic. There are eight Principal Knowledge Topic Categories listed below along with the approximate percentages indicated following the category heading (the detailed list of the 71 topics and how they were mapped to each course is provided in Appendix F):

- a) Professional Conduct and Regulation (7%)
- b) General Principles & Regulation (17%)
- c) Education Planning (6%)
- d) Risk Management and Insurance Planning (12%)
- e) Investment Planning (17%)
- f) Tax Planning (12%)
- g) Retirement Savings and Income Planning (17%)
- h) Estate Planning (12%)

In addition to the Principal Knowledge Topics, other important variables were considered in the development of the curriculum referred to as “Contextual Variables” by the CFP Board and used in the content development for the CFP® Certification Examination. More specifically, financial planning situations require the application of the financial planning knowledge inherent in the 71 topics which differ for different types of clients. Students must consider important client details as part of financial planning process such as: Family Status (traditional family, single parent, same-

sex couples, blended families, widowhood); Net Worth (ultra-high net worth, high net worth, mass affluent, emerging affluent, mass market); Income Level (high, medium, low); Life or Professional Stage (student, starting a career, career transition, pre-retirement, retirement); Other Circumstances (health issues, divorce, change of employment status, aging parents, special needs children). A strong emphasis on case work has been incorporated throughout the program, culminating in a detailed comprehensive plan administered in FIN 4128 Personal Financial Planning Process and Development (the capstone class).

In partnership with the CFP Board and the PFP Advisory Board at the Muma College of Business, and based on the mapping exercise as described above, it was agreed that seven courses with 21-credit hours would adequately cover the 71 topics and the contextual variables associated with financial advice.

A statement of objectives was also developed for the financial planning degree, which was realistic and explicit, reflecting the program's abilities, aspirations, and its response to the needs of students and society. The objectives represent a variety of commitments for the financial planning program, reflecting USF goals and the financial planning profession. This information was then conveyed to the advisory board for discussion and feedback. The Finance faculty used this additional feedback to adjust the curricular goals, learning outcomes, and proposed courses for the B.S./PFP.

The B.S./PFP pre-proposal was reviewed and approved by appropriate governing bodies at the department, college, university, and state in 2017-2018. The full proposal was developed for review and approval in 2018-2019.

Planning Process

Date	Participants	Planning Activity
June 2016	Departmental Faculty, College Dean and Executive Advisory Council (EOC) Members	Initial discussion on creating a B.S. in Personal Financial Planning
August 2016	Finance Faculty	Review of CFP Board registration criteria to become a CFP Board Registered Program.
October 2016	Finance Faculty, Development, EOC members	Circulation of B.S./PFP program proposal to interested parties with a call to form an Advisory Board.
January 2017	First official meeting with the newly formed Advisory Board and Departmental Faculty	Discussion of feasibility of B.S./PFP and the curricular goals, learning outcomes, and proposed courses based upon a mapping of the 71 topics.
November 2017	CFP Board	Approved to be considered a CFP Board Registered Program.

Events Leading to Implementation

Date	Implementation Activity
October 2017	Departmental Faculty approved the Pre-Proposal
December 8, 2017	Muma College of Business' Undergraduate Program Committee and Faculty of the College approved the Pre-Proposal
January 8, 2018	USF's Undergraduate Faculty Council approved the Pre-Proposal

March 22, 2018	USF's Academic Program Advisory Council approved the Pre-Proposal
April 4, 2018	SUS Council of Academic Vice Presidents Academic Program Coordination Workgroup expressed no concerns with the Pre-Proposal
May 2018	The BOT's Academics and Campus Environment Committee approved the Accountability Plan
June 2018	Board Of Trustees (BOT) approved the Accountability Plan
June 20, 2018	Board Of Governors (BOG) approved USF's Accountability Plan
September 2018	Department approves the New Degree Proposal
October 2018	Muma College of Business' Undergraduate Program Committee approved the New Degree Proposal
October 2018	Muma College of Business Faculty approved the New Degree Proposal
April 8, 2019	USF's Undergraduate Council approved the New Degree Proposal
October 17, 2019	USF's Academic Program Advisory Council approved the New Degree Proposal
November 20, 2019	BOT's Academics and Campus Environment Committee approved the New Degree Proposal
December 3, 2019	BOT approved the New Degree Proposal
December 2019	New Degree Proposal submitted to the BOG Staff for their Review
Summer 2020	After BOG Staff Approval: Start degree program after receipt of BOG approval, Promote B.S./PFP to students and Add B.S./PFP to USF 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.

Programs in the home department for this proposal, the Kate Tiedemann School of Business and Finance, are reviewed in the accreditation process by AACSB as part of the Muma College of Business accreditation process. The Muma College of Business was successfully reaccredited by AACSB in 2018. The AACSB reaccreditation process takes place every five years. The B.S./PFP will be reviewed in the next reaccreditation cycle which will begin with an internal program review in 2021-2022 in preparation for a site visit in 2022-2023.

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 is included as Appendix D. The Learning Outcomes are as follows:

Goal 1: Discipline Specific Knowledge and Skills

Learning Objective: Graduates will demonstrate an ability to identify and recall a comprehensive list of financial tools and concepts and the ability to apply them in a problem-solving context. Students will demonstrate critical thinking and analytical abilities, including the capability to engage in inductive, deductive, and quantitative reasoning and to construct sound arguments.

Goal 2: Critical Thinking

Learning Objective: Graduates will demonstrate the ability to evaluate important financial situations and decision-making processes of individuals, businesses and communities to provide viable solutions to benefit individuals.

Goal 3: Communication Skills

Learning Objectives: Graduates will demonstrate the ability communicate effectively, both on an individual basis and in collaboration with others, with individuals, finance professionals, government services and community leaders as well as with other stakeholders.

Goal 4: CFP Board Financial Planning Practice Standards and Ethics

Learning Objectives: Graduates will demonstrate the application of the CFP Board Financial Planning Practice Standards to the financial planning process and the importance of using an ethical framework when making life altering recommendations to clients.

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

Admission to the University is based on the University's Undergraduate Admission Requirements that may be found by clicking on the following urls (urls visited June 2019):

- Freshman: <https://www.usf.edu/admissions/freshmen/admission-information/requirements-deadlines.aspx>;
- Transfer: <https://www.usf.edu/admissions/transfer/admission-information/index.aspx>;
- International: <https://www.usf.edu/admissions/international/admission-information/index.aspx>.

To matriculate to the upper-division courses required for the B.S./PFP, students must earn a minimum grade of C- in the following courses:

ACG 2021 Principles of Financial Accounting	CGS 2100 Computers in Business
ACG 2071 Principles of Managerial Accounting	MAC 2233 Business Calculus
ECO 2013 Economic Principles: Macroeconomics	
ECO 2023 Economic Principles: Microeconomics	
QMB 2100 Business & Economic Statistics I	

Graduation requirements for B.S. Personal Financial Planning Degree:

For graduation, students must satisfactorily complete a minimum of 120 credit hours. Of the minimum 120, 21 hours must include the seven Personal Financial Planning required courses, at least 60 hours must be business courses, and a minimum of 54 hours must be non-business courses (i.e., all courses not normally offered by the Muma College of Business). Additional non-restricted electives may be required to reach a minimum of 120 hours and can be either business or non-business courses.

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.

In addition to university degree and business core requirements, students must complete 21 hours of upper-level finance courses beyond FIN 3403 for a total of 120 credit hours.

Core Personal Financial planning - 21 hours

- FIN 3144 Financial Planning Fundamentals
- FIN 4504 Principals of Investments
- TAX 4001 Concepts of Federal Income Taxation
- FIN 4132 Estate Planning
- RMI 4135 Retirement Planning and Employee Benefits
- RMI 3011 Principles of Insurance
- FIN 4128 Personal Financial Planning Process and Development (Capstone)

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

The eight-semester and four-semester plans indicate the required courses for this degree program and recommended sequence of registration for full-time students and may be found in Appendix D.

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

Course Description are provided for the major courses.

FIN 3144: Financial Planning Fundamentals (3 credit hours). This course is an overview of the problems and techniques of personal financial planning. The content includes consumer credit, insurance, taxes, home ownership, personal investment, managing cash income, controlling expenditures and estate planning.

TAX 4001: Concepts of Federal Income Tax (3 credit hours). This course offers major concepts used in taxation of income by federal government, including enactment of tax laws, basic tax research, preparation of basic tax returns and exploration of tax policy issues.

FIN 4504: Principles of Investments (3 credit hours). This course provides a 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.

RMI 4135: Retirement Planning and Employee Benefits (3 credit hours). This course is an introduction to the retirement planning process, qualified and non-qualified retirement plans, social security and cafeteria plans.

RMI 3011: Principles of Insurance (3 credit hours). The content of this course includes: 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.

FIN 4132: Estate Planning (3 credit hours). This course focuses on the fundamentals of estate planning, including the social and family implications of federal/state taxation of transfers of wealth by gift or at death. Trusts, guardianships, and post mortem planning are covered.

FIN 4128: Personal Financial Planning Process and Development (3 credit hours). This is the capstone course for the PFP major. It examines professional issues in financial planning, including:

ethical considerations; regulation and certification requirements; written and oral communication skills; professional responsibility.

- 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. The program is not in the science and technology disciplines.

- 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 Muma College of Business was successfully reaccredited by AACSB in 2018. The AACSB reaccreditation process takes place every five years. The B.S./PFP will be reviewed in the next reaccreditation cycle which will begin with an internal program review in 2021-2022 in preparation for a site visit in 2022-2023.

The major is also registered with the CFP Board and will remain registered under the new CIP. CFP Board Registered Programs are financial planning education programs at the college or university level that meet specific criteria for educating individuals who wish to fulfill the education component for obtaining CFP® certification. Individuals who meet CFP Board's education requirement are eligible to sit for the CFP® Certification Examination. Successful completion of the education and examination components completes two of the core prerequisites to obtain CFP® certification. To register a program, an institution must apply for review by CFP Board. Registration was granted to the USF PFP major in Spring 2018. Registration must be renewed every other year.

- 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. This is not 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.**

The Personal Financial Planning program will be delivered in a traditional face-to-face method on the USF campuses. No specialized services are required.

We are currently collaborating with the University of Tampa to deliver a CFP® preparatory boot camp for students who have graduated and are getting ready for the exam. We have begun talks with UNF to develop a Financial Literacy program to raise awareness throughout Florida, but these discussions have just begun.

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).**

Full-time faculty who will teach in the Personal Financial Planning degree program as found in Appendix A, Table-4 include:

Laura Mattia, Ph.D., CFP®, Instructor, Personal Financial Planning
 Luke Richardson, M.S., CPA, Instructor, Accounting
 Lei Wedge, Ph.D., Associate Professor, Finance
 Gary Laursen, J.D., LL.M. CPA, Associate Professor, Accounting

In addition to full-time faculty, one adjunct, for one semester per year will be hired to teach RMI 4135 Retirement Planning and Employee Benefits at a cost of \$7,000 annually.

- 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 stated, the proposed Personal Financial planning degree program is replacing an existing major and resources from that stream will be reallocated to the proposed degree program. Salary of existing faculty members, proportional to their respective effort, will be reallocated to the degree program totaling \$204,159.

The faculty salaries and benefits are expected to increase by 7% to \$218,450 in Year 5. A 7% increase is also projected for A&P salaries. The budget also provides support for one graduate assistant projected at \$15,000 (including health benefits) and increasing by 7% to \$16,000 in Year 5. Additional temporary support personnel are budgeted at \$7,000/year. Operating funds to support student events and travel are provided through contributions made to the college's foundation accounts.

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

The curriculum vitae for the following faculty members may be found in Appendix G:

Laura Mattia, Ph.D., CFP
 Luke Richardson, M.S., CPA
 Lei Wedge, Ph.D.
 Gary Laursen, J.D., LL.M., CPA

- 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 B.S./PFP is homed in the Kate Tiedemann School of Business and Finance in the Muma College of Business. The Kate Tiedemann School of Business and Finance currently has 17 full-time faculty members, including those teaching courses in the PFP program. Data are provided based on the current composition of the faculty; however, as we move forward with consolidation we anticipate growth in the numbers being provided in the following table.

The following statistics are for the Kate Tiedemann School of Business and Finance:

	AY 2014-2015	AY 2015-2016	AY 2016-2017	2017-2018
Average Course Load	4.5	4.5	4.7	4.6
Student HC (Spring 2019)	530	609	675	771
FTE Generated	360	357	380	422
No. of Degrees Awarded	365	305	377	420
Scholarly Publications*	11	15	13	14

*Note: Publications are based on calendar years 2015, 2016, 2017, and 2018, respectively.

The faculty at the Kate Tiedemann School of Business and Finance are actively involved in service at all levels. They also actively participate in professional activities outside the university. For example, one of our faculty members earns the designation of Certified Financial Planner (CFP®) and three others are the charter-holders of Chartered Financial Analyst (CFA®). These designations are the gold standards for financial analysis, wealth management, financial advising and financial planning professionals.

The program director for the Personal Financial Planning program participates in outreach with the financial services industry and the media, building awareness of the PFP program at USF. In 2018-2019, the following speaking engagements occurred/scheduled:

Women's Resource Center (month of July 2018)

- Women's Financial Empowerment Workshops – Three sessions at USF Sarasota

Academy of Finance (October 2, 2018)

- Determinants of Career Preparedness

Financial Planning Association (October 4, 2018)

- Women's Workshop
- Moderator: International Finance
- Moderator: Industry Leadership, FPA and CFP Board

TEDxSaintMichaelsCollege (November 11, 2018)

- Catching the Fifth Wave – Female Financial empowerment

CFP Board Conference (February 22, 2019)

- Preparing Women for Success As Financial Planners

MassMutual and the Financial Advisor Magazine (April 23, 2019)

- Inspiring Women to Improve their Financial Wellness

2019 Invest In Women (April 29 - May 1, 2019)

- Cultivating Courage and Confidence for Success as a Financial Advisor
- Working With Executive Women

Financial Therapy Association 2019 Conference (May 11 2019)

- Financial Confidence Post-Widowhood: The Role of Empowerment

TedxSanJuanIsland (June 22, 2019)

- Creating a Courageous Career

27th Private Wealth Management Summit (September 11, 2019)

- Navigating the Global Marketplace in an Era of Heightened Volatility

Media/Books/Articles

Various radio and TV appearances including Channel 7 Suncoast where Dr. Mattia was recognized as an "Amazing Suncoast Woman."

Dr. Mattia is author of "Gender on Wall Street: Uncovering Opportunities for Women in Financial Services" published June 2018 by Palgrave Macmillan.

This year Dr. Mattia wrote two industry articles and is quoted in various publications:

- "Do you have a retirement plan? Consider an Apprentice from a Personal Financial Planning program" NAPFA Advisor, January 2019
- "The final key to gender equality is mastery of money" Market Watch, June 2018

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.

Part I – Overview of USF Libraries, Mission, and Program/Discipline Strengths

The University of South Florida (USF) is accredited by the Southern Association of Colleges and Schools' Commission on Colleges to award associate, baccalaureate, master's, specialist and doctorate degrees. 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 and the Hinks and Elaine Shimberg Health Sciences Library, both located on the Tampa Campus; the Nelson Poynter Memorial Library, USF St. Petersburg campus; and an Information Commons at the USF Sarasota-Manatee campus. Access to print resources at the USF Tampa Library is available 24/5, and access to electronic resources is available remotely 24/7.

The USF Libraries inspire research, creativity, and learning by connecting the USF community to relevant and high-quality information. Our vision is to become the center of a highly engaged university community, driven to produce high-impact research and to nourish creativity. Together, the USF Libraries provide access to more than 2 million volumes and an extensive collection of electronic resources including approximately 64,928 e-journal subscriptions and over 900 aggregator databases containing another 92,855 unique e-journal titles, 693,313 e-books, and 826,000 digital images. In addition, students have access to over 83,000 audio/visual materials including electronic media, music scores, audiobooks, CDs, and DVDs.

The USF Libraries endeavor to develop and maintain a research collection that satisfies the resource

needs of the undergraduate and graduate curriculums in the Muma College of Business and also meets the specialized needs of the students and faculty for a Bachelor of Science program in Personal Financial Planning.

Part II - USF Libraries' Collections
MONOGRAPHS (Print and Ebooks)

The USF Libraries contain extensive holdings of books in both print and e-book format that support student and faculty instructional and research needs in the new program. To identify the scope of relevant books, titles were derived from searching the library's catalog by Library of Congress Subject Headings pertaining to Personal Financial Planning.

MONOGRAPHIC COUNTS			
Library of Congress Subject Headings for Personal Financial Planning			
Library of Congress (LC) Call Number	Subject Heading	Print	Number of E-books
HF 5415.32	Consumer behavior	87	227
HG 173	Finance	5394	9743
HG 179	Personal finance	445	802
HG 201-2496	Money	762	2463
HG 1501-3550	Banking	1743	2365
HG 3691-3769	Credit. Debt. Loans	151	1211
HG 3810-4000	International finance	867	3593
HG 4001-4285	Finance management	456	991
HG 4501-6051	Investment	2277	2546
HG 8011-9999	Insurance	896	2676
Total Books		13,078	26,617

Total Number of Monographs

- Print = 13,078
- Electronic = 26,617

Ebooks and Ebook Collections

- EBSCO Ebook Collection
- Oxford Scholarship Online and University Press Scholarship Online
- ProQuest Ebook Central
- ScienceDirect

- SpringerNature eBooks including Collection in Business and Economics
- Wiley Online Library

MAJOR SERIAL TITLES (JOURNALS)

The USF Libraries subscribe to several scholarly and professional journals that have an editorial scope and content which support curricular activities at the Bachelor of Science level. A majority of the titles are in electronic format thereby enhancing accessibility. Journal titles were derived by searching Scopus SciMago and Web of Science JCR ranked journals for curriculum topics in Personal Financial Planning.

Serial Title Subscriptions and Access

- 100 Journal Titles (electronic format)

Major Serial Titles			
Title	SJR	H index	USF Coverage
Journal of Finance	17.973	264	Wiley Online Library 01/01/1997 - present
Journal of Financial Economics	13.636	223	ScienceDirect 05/01/1974 - present
Review of Financial Studies	12.516	157	Oxford University Press 01/01/1996 - present
Journal of Accounting Research	10.151	118	Wiley Online Library 01/01/2001 - present
Journal of Management	7.936	192	SAGE Premier All Access Collection 02/01/1999 - present
Journal of Monetary Economics	7.248	112	ScienceDirect Freedom Collection 02/01/1995 - present
Journal of Accounting and Economics	6.606	132	ScienceDirect 03/01/1979 - present
Accounting Review	5.240	133	Business Source Premier 03/01/1926 - present
Annual Review of Financial Economics	4.584	22	Annual Reviews 01/01/2009 - present
Journal of International Economics	4.347	121	ScienceDirect 01/01/1971 - present
Journal of Financial and Quantitative Analysis	3.986	101	Cambridge Journals Online 03/01/2004 - present
Journal of Public Economics	3.691	123	ScienceDirect 04/01/1972 - present
Journal of Financial Intermediation	3.514	67	ScienceDirect 03/01/1990 - present
Review of Finance	3.465	47	Oxford University Press 01/01/2004 - present
Journal of Risk and Uncertainty	3.449	65	Springer Nature Journals 03/01/1988 - present
Contemporary Accounting Research	2.895	81	Wiley Online Library 01/01/1997 - present
Mathematical Finance	2.834	68	Wiley Online Library 01/01/1997 - present
Journal of World Business	2.672	95	ScienceDirect Freedom Collection 03/01/1997 - present
Real Estate Economics	2.531	54	Wiley Online Library 01/01/1997 - present
Auditing	2.417	63	Business Source Premier 06/01/1981 - present
Journal of Money, Credit and Banking	2.357	95	Wiley Online Library 01/01/2007 - present
Journal of Financial	2.282	31	Oxford University Press 01/01/2003 - present

Major Serial Titles			
Title	SJR	H index	USF Coverage
Econometrics			
Finance and Stochastics	2.254	38	Business Source Premier 01/01/1997 - present
European Economic Review	2.210	116	ScienceDirect Freedom Collection 01/01/1995 - present
Management Accounting Research	2.166	76	ScienceDirect 03/01/1993 - present
Long Range Planning	2.036	89	ScienceDirect Freedom Collection 02/01/1995 - present
Critical Perspectives on Accounting	1.853	57	ScienceDirect 03/01/1990 - present
Games and Economic Behavior	1.814	84	ScienceDirect Freedom Collection 01/01/1995 - present
World Bank Economic Review	1.757	79	Oxford University Press 01/01/1996 - present
Journal of Corporate Finance	1.748	83	ScienceDirect Freedom Collection 04/01/1995 - present
SIAM Journal on Financial Mathematics	1.728	24	SIAM Journals Online 01/01/2010 - present
Journal of International Management	1.673	60	ScienceDirect Freedom Collection 07/01/1998 - present
Family Business Review	1.639	87	SAGE Premier All Access Collection 03/01/1999 - present
Journal of Banking and Finance	1.599	135	ScienceDirect 06/01/1977 - present
Journal of Financial Stability	1.488	38	ScienceDirect Freedom Collection 09/01/2004 - present
Financial Markets, Institutions and Instruments	1.376	20	Wiley Online Library 01/01/1997 - present
International Business Review	1.373	79	ScienceDirect Freedom Collection 03/01/1995 - present
Journal of International Money and Finance	1.370	83	ScienceDirect 01/01/1982 - present
Tax Policy and the Economy	1.276	10	Business Source Premier 07/01/2008 - present
Financial Management	1.262	59	Business Source Premier 03/01/2000 - present
Journal of Risk and Insurance	1.197	56	Wiley Online Library 01/01/2002 - present
Journal of Empirical Finance	1.072	66	ScienceDirect Freedom Collection 03/01/1995 - present
China Economic Review	1.052	61	ScienceDirect Freedom Collection 03/01/1995 - present
Journal of Financial Markets	1.033	52	ScienceDirect Freedom Collection 04/30/1998 - present
American Law and Economics Review	1.014	29	Oxford University Press 01/01/1999 - present
Journal of Financial Services Research	0.965	46	Springer Nature Journals 09/01/1987 - present
Journal of Business Finance and Accounting	0.956	64	Wiley Online Library 01/01/1997 - present
Journal of International Financial Markets, Institutions	0.956	45	ScienceDirect Freedom Collection 04/01/1997 - present

Major Serial Titles			
Title	SJR	H index	USF Coverage
and Money			
Journal of Public Economic Theory	0.935	29	Wiley Online Library 01/01/1999 - present
Financial Analysts Journal	0.920	69	Taylor & Francis Social Science and Humanities Library 01/01/1997 - present
National Tax Journal	0.899	51	Business Insights: Essentials 12/01/1991 - present
Journal of Accounting, Auditing and Finance	0.885	42	SAGE Premier All Access Collection 01/01/1999 - present
Journal of Real Estate Finance and Economics	0.885	54	Springer Nature Journals 01/01/1988 - present
Journal of Pension Economics and Finance	0.875	25	Cambridge Journals Online 03/01/2002 - present
Journal of the American Taxation Association	0.850	17	Business Source Premier 06/01/1979 - present
Journal of Futures Markets	0.829	48	Wiley Online Library 01/01/1997 - present
Pacific Basin Finance Journal	0.787	47	ScienceDirect 03/01/1993 - present
Mathematics and Financial Economics	0.784	16	Springer Nature Journals 01/01/2007 - present
International Review of Financial Analysis	0.782	43	ScienceDirect Freedom Collection 01/01/1995 - present
Technological and Economic Development of Economy	0.774	39	Business Source Premier 03/01/2005 - present
International Review of Economics and Finance	0.772	42	ScienceDirect Freedom Collection 01/01/1995 - present
Finance Research Letters	0.770	24	ScienceDirect Freedom Collection 03/01/2004 - present
Quantitative Finance	0.769	61	Taylor & Francis Social Science and Humanities Library 01/01/2001 - present
International Tax and Public Finance	0.768	45	Springer Nature Journals 01/01/1994 - present
Economics Letters	0.767	82	ScienceDirect Freedom Collection 01/01/1995 - present
Journal of Financial Research	0.760	43	Wiley Online Library 01/01/1997 - present
Journal of Commodity Markets	0.725	5	ScienceDirect Freedom Collection 03/01/2016 - present
ASTIN Bulletin	0.673	36	Cambridge Journals Online 05/01/2009 - present
Venture Capital	0.665	44	Taylor & Francis Social Science and Humanities Library 01/01/1999 - present
World Economy	0.661	60	Wiley Online Library 01/01/1997 - present
Quarterly Journal of Finance	0.650	3	Business Source Premier 01/01/2008 - present
Review of Quantitative Finance and Accounting	0.650	36	Springer Nature Journals 01/01/1991 - present
Research in International Business and Finance	0.647	31	ScienceDirect Freedom Collection 04/01/2004 - present

Major Serial Titles			
Title	SJR	H index	USF Coverage
Global Finance Journal	0.636	29	ScienceDirect Freedom Collection 03/01/1995 - present
Journal of Behavioral and Experimental Finance	0.635	9	ScienceDirect Freedom Collection 03/01/2014 - present
Fiscal Studies	0.625	35	Wiley Online Library 01/01/1997 - present
Journal of Asian Economics	0.616	38	ScienceDirect Freedom Collection 12/01/1994 - present
Journal of Behavioral Finance	0.581	14	Taylor & Francis 01/01/2000 - present
Financial Review	0.567	39	Wiley Online Library 01/01/1997 - present
Journal of International Accounting, Auditing and Taxation	0.563	34	ScienceDirect Freedom Collection 01/01/1995 - present
North American Journal of Economics and Finance	0.552	31	ScienceDirect Freedom Collection 03/01/1995 - present
Journal of Sustainable Finance and Investment	0.520	10	Taylor & Francis Social Science and Humanities Library 01/01/2011 - present
International Journal of Finance and Economics	0.514	36	Wiley Online Library 01/01/1996 - present
International Review of Law and Economics	0.514	38	ScienceDirect 06/01/1981 - present
Public Finance Review	0.510	28	SAGE Premier All Access Collection 01/01/1999 - present
International Journal of Theoretical and Applied Finance	0.496	27	ABI/INFORM Global 01/01/2015 - present
Journal of Multinational Financial Management	0.490	36	ScienceDirect Freedom Collection 04/01/1997 - present
Accounting in Europe	0.486	15	Taylor & Francis Social Science and Humanities Library 01/01/2004 - present
Quarterly Review of Economics and Finance	0.486	44	ScienceDirect Freedom Collection 12/01/1994 - present
Asian Economic Papers	0.485	12	Business Source Premier 01/01/2003 - present
Journal of Fixed Income	0.480	12	Business Insights: Essentials 03/01/2003 - present
International Journal of Accounting Information Systems	0.478	44	ScienceDirect Freedom Collection 03/01/2000 - present
Journal of Derivatives	0.478	41	Business Insights: Essentials 03/01/2003 - present
Journal of Portfolio Management	0.475	43	Business Insights: Essentials 06/01/2000 - present
Journal of International Financial Management and Accounting	0.472	31	Wiley Online Library 01/01/1997 - present
Public Budgeting and Finance	0.472	27	Wiley Online Library 01/01/1997 - present
Geneva Papers on Risk and Insurance: Issues and Practice	0.461	28	ABI/INFORM Global 01/01/1976 - present
Applied Mathematical Finance	0.455	25	Taylor & Francis Social Science and Humanities Library 01/01/1997 - present

Major Serial Titles			
Title	SJR	H index	USF Coverage
Pacific Accounting Review	0.453	17	Business Source Premier 03/01/1999 - present
EuroMed Journal of Business	0.450	14	ABI/INFORM Global 01/01/2006 - present

DATABASES and DIGITAL LIBRARIES

Scholarly, research and instructional activities associated with Personal Financial Planning endeavors are supported by a number of both specialized business and general scientific databases which provide access to indexes, journal articles, and monographs.

Key Personal Financial Planning Databases

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. Market research reports contain trends, statistics and analysis on market size, market share of competitors and industry growth rates. Major market segments are identified and also those forces affecting demand and supply within the industry. Performance analysis includes emerging industry trends as well as recent production performance.

Mergent Online

Mergent online provides U.S. and international company data ranging from comprehensive information on companies that is downloadable in PDF, Word, or Excel to one page profiles of over 10,000 U.S. companies. Provides data including business description, history, property, subsidiaries, officers and directors, long-term debt and capital stock. Financial statements are presented in "as-reported" form and in native currencies, maintaining the full integrity of this critical information.

Morningstar Investment Research Center

Morningstar Investment Research Center enables research on more than 20,000 stocks and mutual funds, with the information as current as the day's trading. There are three different ways to use Morningstar Investment Research Center. "Stock and fund screeners" searches for an investment based on criteria selected. There are more than 220 data points for mutual funds and more than 470 with stock screener. The reports area provides analyst reports on specific funds or stocks, gauging the value of a specific stock or fund. Reports also includes quotes, performance indicators, ownership detail, and more. The portfolio module allows a comparison and analysis of all investments.

Standard & Poors's NetAdvantage

Covers markets, industries, stocks, bonds, and dividends as well as the S & P Analysis. Provides access to 11 key financial publications: Bond guide; Corporation records; Dividend record; Earnings guide; Industry surveys; Mutual fund reports; The Outlook; Standard & Poor's Register; Stock guide; and the Stock reports.

WRDS

Wharton Research Data Services (WRDS) is a web-based business data research service from The Wharton School at the University of Pennsylvania. WRDS is the de facto standard for business data, providing researchers worldwide with instant access to financial, economic, and marketing data through a uniform, web-based interface. -- Current Subscriptions: AuditAnalytics; Bank Regulatory; Blockholders; CBOE Indexes; Compustat; CRSP; CUSIP Master File; DMEF Academic Data; Dow Jones; FDIC; Fama French; Federal Reserve Bank Reports; I/B/E/S; KLD; PHLX; Penn World Tables; SEC Order Execution; TRACE.

General Business Databases**ABI/INFORM COLLECTION**

This database comprises 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. Its international coverage gives researchers a complete picture of companies and business trends around the world.

Business Abstracts With Full Text

Wilson Business Full Text provides fast, convenient access to a multitude of outstanding sources -- from The New York Times Business Section and The Wall Street Journal to magazines and scholarly journals. Users will find feature articles, product reviews, interviews, biographical sketches, corporate profiles, obituaries, surveys, book reviews, reports from associations, societies, trade shows and conferences, and more. Full text of articles from more than 350 publications as far back as 1995. Provides SIC and NAICS codes for names of corporations and industries used as subject headings. Daily updates bring users current information.

Business Insights

Business Insights: Essentials is the improved version of Business & Company Resource Center, including all the same functionality and detailed information, as well as enhanced content and updated interface. It provides company profiles, company brand information, rankings, investment reports, company histories, chronologies, and industry news and information.

Business Source Premier

Business Source Premier is one of the definitive scholarly databases in the field of business due to its depth and coverage. The database provides full text articles from more than 2,300 journals, including over 1,100 peer reviewed journals, and indexing for an additional 1,000 titles. Full text coverage dates vary, but some go back to the first issue of the journal. Full text articles from the Harvard Business Review date back to 1922.

EconLit

EconLit is the American Economic Association's electronic bibliography of economic literature. EconLit is an expanded version of the Journal of economic literature (JEL) indexes of journals, books, and dissertations. In addition, EconLit includes citations to articles in collective volumes indexed in the annual volumes of the Index of economic articles, articles from over 250 journals not indexed in JEL, and the full-text of JEL book reviews.

MarketLine Advantage

A searchable online business information service. Provides three types of profiles: 1. Company profiles (including company description, history, products and services, key employees, leading competitors, daily market share, news links); 2. Industry profiles (including market overview, sizing, segmentation, competitive landscape, leading companies, forecasts); 3. Country profiles (including economic performance review, GDP, development potential).

MarketResearch.com

MarketResearch.com focuses on full-text market research reports with graphs, charts and tables. MarketResearch.com currently contains approximately 500 full-length market research reports, with more added every quarter.

Mintel Academic

Mintel Academic (Mintel Reports) is one of the leading marketing research databases being utilized by 120 of the top U.S. universities. The academic version of Mintel Reports provides comprehensive coverage of the U.S. and European markets from consumer behavior to SWOT and brand share analysis. Analysis combines consumer habits and attitudes within the competitive landscape. A five-year forecast shows how businesses anticipate and plan for the future. The database includes a wide range of consumer market reports as well as daily news articles on corporate, product and advertising activity. The market reports analyze market sizes and trends, market segmentation, and consumer attitudes and purchasing habits.

Nexis Uni

Nexis Uni (formerly LexisNexis Academic) features more than 15,000 news, business and legal sources, including: - print and online journals, television and radio broadcasts, newswires and blogs; - local, regional, national and international newspapers with deep archives; - U.S. Supreme Court decisions dating back to 1790; - business information on more than 80 million U.S. and international companies and more than 75 million executives.

ProcurementIQ [US Procurement: Procurement Research Reports]

Procurement Research Reports cover hundreds of indirect purchasing lines. The reports contain data and analysis related to product or service pricing dynamics, product characteristics that affect the purchasing decision, supplier benchmarking and supply chain risks, and negotiation questions and tactics. (Formerly IBISWorld Procurement)

- 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 collections of the USF Library and affiliates are sufficient to support the new program proposal for a Bachelor of Science in Personal Financial Planning in the Muma College of Business. The Libraries maintain an exceptionally strong collection of resources and services needed to support USF as a Preeminent Research University. The librarians and Dean of the Libraries work closely with the Muma College of Business to ensure all curricular and research needs are more than adequately supported. No additional resources are required to support the new program at this time. Strategic investments are required as new faculty are hired and areas of emphasis, including new research agendas not described in this proposal, evolve.

- 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 university has a centralized space planning office through the university; it reserves classroom space for classes. All classrooms in the university are now "multimedia enabled." With at minimum a PC, projector, internet connectivity and audio support. We believe that we have adequate and sufficient classroom space and associated equipment to support the attainment of course outcomes and to provide an atmosphere conducive to learning.

- 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 space is needed to carry out the requested new degree 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.**

No additional capital expenditure is needed to carry out the requested new degree program.

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

No specialize equipment is needed to carry out the requested new degree 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.**

No specialize equipment is needed to carry out the requested new degree 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.**

No additional special categories of resources are needed to carry out the requested new degree 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.**

There is one graduate assistant with \$15,000 (including health benefits) allocated in year one and one graduate assistant with \$16,000 allocated in year five. There are two scholarship programs started by members of the advisory board and the program director to be used for student success, travel, CFP® preparation classes and sitting for the CFP® exam. The scholarships are funded through outside resources and will not be a cost to the 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.**

Internship and practicum experience is heavily encouraged and up to 9 credit hours can be taken as restricted electives, with no more than 3 credits in one company. Students are encouraged to participate in internships. We are actively in conversations with many local firms and we are developing a Registered Investment Advisor campaign, kicked-off with an article the program director published in the January 2019 Advisor Magazine. A mailing with this article, followed up with a phone call and an invitation to USF is currently underway to establish relationships with this newly developing but very attractive business channel where there are many satisfying and well-paying jobs. We are also pursuing residencies available throughout the country where students are trained under a CFP® professional for several years and then are released to find adequate employment as an accomplished CFP® practitioner. Currently the list of internships we have received this year are:

- Raymond James, St. Pete

- Fidelity, Tampa
- Moisand Fitzgerald, Tamayo, Orlando
- Altfest Personal Wealth Management, NYC
- Northwestern Mutual, Tampa
- BMO, Tampa
- SRQ Wealth, Sarasota
- AXA Wealth Management, Tampa
- Cornerstone Wealth Advisors, Minneapolis (summer residency)
- Laurence Financial

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**	50	40	40	32	35	28	30	24	20	16
Students who initially entered the university as FTIC students and who are progressing from the lower to the upper level***	25	20	33	26	42	34	55	44	71	57
Florida College System transfers to the upper level***	10	8	15	12	20	16	30	24	50	40
Transfers to the upper level from other Florida colleges and universities***	5	4	10	8	15	12	20	16	25	20
Transfers from out of state colleges and universities***	5	4	10	8	15	12	20	16	25	20
Other (Explain)***	0	0	0	0	0	0	0	0	0	0
Totals	95	76	108	86	127	102	155	124	191	153

* 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 columns 1+...+7	Funding Source					Subtotal columns 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
Columns	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Faculty Salaries and Benefits	204,159	0	0	0	0	0	0	\$204,159	218,450	0	0	0	0	0	\$218,450
A & P Salaries and Benefits	2,893	0	0	0	0	0	0	\$2,893	3,096	0	0	0	0	0	\$3,096
USPS Salaries and Benefits	0	0	0	0	0	0	0	\$0	0	0	0	0	0	0	\$0
Other Personal Services	7,000	0	0	0	0	0	0	\$7,000	7,000	0	0	0	0	0	\$7,000
Assistantships & Fellowships	15,000	0	0	0	0	0	0	\$15,000	16,000	0	0	0	0	0	\$16,000
Library	0	0	0	0	0	0	0	\$0	0	0	0	0	0	0	\$0
Expenses	0	0	0	0	0	17,550	0	\$17,550	0	0	0	0	17,550	0	\$17,550
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	\$229,052	\$0	\$0	\$0	\$0	\$17,550	\$0	\$246,602	\$244,546	\$0	\$0	\$0	\$17,550	\$0	\$262,096

*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)	1.05	1.05	From Table 4
A & P (FTE)	0.07	0.07	
USPS (FTE)	0	0	

From Table 1

Calculated Cost per Student FTE

	Year 1	Year 5
Total E&G Funding	\$229,052	\$244,546
Annual Student FTE	76	153
E&G Cost per FTE	\$3,014	\$1,598

APPENDIX A

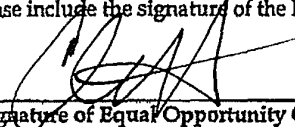
**TABLE 4
ANTICIPATED FACULTY PARTICIPATION**

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	Laura Mattia, Ph.D., CFP Personal Financial Planning	Instructor	MYA	Fall 2020	9	0.75	1.00	0.75	9	0.75	1.00	0.75
A	Luke Richardson, M.S., CPA Accounting	Instructor	MYA	Fall 2020	9	0.75	0.10	0.08	9	0.75	0.10	0.08
A	Lei Wedge, Ph.D. Finance	Associate Professor	Tenured	Fall 2020	9	0.75	0.10	0.08	9	0.75	0.10	0.08
A	Gary Laursen, J.D., L.L.M, CPA Accounting	Associate Professor	Tenured	Fall 2020	9	0.75	0.20	0.15	9	0.75	0.20	0.15
Total Person-Years (PY)								1.05				1.05

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	1.05	1.05
B	New faculty to be hired on a vacant line	Current Education & General Revenue	0.00	0.00
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 1.05	Year 5 1.05

APPENDIX B

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



Signature of Equal Opportunity Officer

4/2/19

Date



Signature of Library Director

For Dean Chavez
3/26/2019

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: Letters of Support

RAYMOND JAMES®

March 25, 2019

University of South Florida
Laura Mattia, Ph.D., MBA, CFP®
Raymond James Personal Financial Planning Program Director
Muma College of Business
4202 E. Fowler Ave, BSN3122 | Tampa, FL | 33620

Dr. Mattia:

We are excited to learn about the progress of the Personal Financial Planning degree program at the Muma College of Business, University of South Florida. As the largest financial services provider in this region, we are actively seeking future talent to meet the growing demands of the industry and our organization. The potential of you offering a BS in Personal Financial Planning at the University of South Florida could support these needs, not only for our firm, but for the Financial Services industry in general.

Raymond James currently has over 7,000 Financial Advisors, and we are growing. As you already know, our industry needs young people to take over the practices of advisors as they begin to retire. Having the PFP program at USF provides us with the knowledge that the next generation of advisors is being educated by a university that knows how to produce the talent that will be needed.

We feel strongly about the program, having donated \$200,000 last year. In addition to the monetary support, Raymond James has numerous employees and independent contractors that have donated their own money, talent and time to ensure the program survives and thrives. Our state needs more than one university with a Personal Financial Planning degree program and USF offering the degree makes sense given the major financial services employers in our state.

Raymond James believes in your efforts to produce the next generation of ethical, competent advisors who will put their client's interests first and foremost - above their own. Reaching out to industry leaders and connecting/involving us with your program can only lead to a stronger educational system that will attract quality student talent to USF's Personal Financial Planning degree that will ultimately benefit all firms in our industry.

Kindest Regards,


Jodi Perry
President, Independent Contractor Division
Raymond James Financial Services

RJFS Branch Manager Supervision
880 Carillon Parkway Saint Petersburg, FL 33716
T 800.248.8863 x78888 D 727.567.8888 F 727.567.8009
Raymond James Financial Services, Inc.

Appendix C: Letters of Support



March 25, 2019

Laura Mattia, Ph.D., MBA, CFP®
Raymond James Personal Financial Planning Program Director
University of South Florida
Muma College of Business
4202 E. Fowler Ave, BSN3122
Tampa, FL 33620

Dear Dr. Mattia:

Thank you for sharing the University of South Florida's BS in Personal Financial Planning degree proposal (PFP). The Financial Planning Association (FPA) of Tampa Bay currently does and will continue to support your efforts in creating a separate degree program in Personal Financial Planning that will teach and develop the next generation of Financial Advisors in our state. As you already know there is a growing demand for financial advisors in Florida given our demographics. Florida is the third-most populous state in the country, behind California and Texas. Our population grew by 11.6% from 2010 to 2017 vs. 2.4% in New York. Many of the people coming to our state are retiring and will need financial advisors to help them plan for their retirement years.

The average age of financial advisors is over 50 years old and nearly one-third of them will be retiring over the next 10 years. There is an increasing demand for young, educated talent to take over these practices. Having the personal financial planning degree program at USF helps our industry by providing competent, ethical advisors as current employers start the planning process to transition their practices to the next generation.

The Financial Planning Association™ (FPA®) of Northeast Florida supports and is engaged in the Personal Financial Planning degree program at the University of North Florida. And, FPA of Tampa Bay was instrumental in establishing the FPA Student Chapter at the University of South Florida. We have provided the students with a structure and mentor to grow their organization on campus. They are learning how to organize a board, recruit members and provide quality programs for their fellow PFP students. The FPA of Northeast Florida and FPA of Tampa Bay are committed to working with both UNF and USF to provide opportunities for the graduates of both programs. Having these programs in Florida allows employers in our state to hire talent from within our university system vs. having to recruit from universities in Texas or Georgia with PFP programs. Add to this a shortage of experienced CERTIFIED FINANCIAL PLANNER™ talent, we could see students from our system being sought after by employers in states without the PFP program as well.

FPA of Tampa Bay will do what is needed to support and help you grow the program at USF. We will continue to work closely with you and the students to provide them with opportunities to explore careers in Financial Services.

Kindest Regards,

Jodi B. Perez, CFP®
President

12157 W Linebaugh Ave PMB 312 • Tampa, FL 33626-1732 • (813) 814-1630
Info@PlanningTampabay.org • PlanningTampaBay.org

Appendix C: Letters of Support



March 25, 2019

Stephen C. Craffen
National Chair NAPFA
Partner, Stonegate Wealth Management
393 Ramapo Valley Road
Oakland, NJ 07436

University of South Florida
Laura Mattia, Ph.D., MBA, CFP®
Raymond James Personal Financial Planning Program Director
Muma College of Business
4202 E. Fowler Ave, BSN3122 | Tampa, FL | 33620

Dear Dr. Mattia,

We are excited to learn about your opportunity to offer a degree in Personal Financial Planning at the Muma College of Business, University of South Florida. This program is important to the field of Financial Planning. As National Chair of NAPFA (2018-2019) I am well aware of the need for consumers to have access to well-educated and competent Certified Financial Planner Professionals. There are over 300,000 advisors in this field yet less than 85,000 of them are CFP®'s. This program serves both a strong need to educate young persons who want to enter this field as well as providing a benefit to society. Those that have hired a qualified CFP® professional to assist them with facets of their financial circumstance generally are much better prepared for retirement and other aspects of their finances.

Sincerely,

Stonegate Wealth Management, LLC


Stephen C. Craffen, MBA, MS, CFA, ChFC, CLU, CFP®
Managing Partner

393 Ramapo Valley Road, Oakland, NJ 07436 ♦ Phone: 201-791-0085 Fax: 201-625-6303

www.stonegatewealth.com

Registered Investment Advisors

Appendix C: Letters of Support



DEPARTMENT OF ACCOUNTING & FINANCE

Coggin
College of Business

April 2, 2019

To Whom It May Concern:

As the oldest program in the State of Florida, it is the pleasure of UNF's B.B.A. in Financial Planning to fully support the newly developed degree in Personal Financial Planning at USF.

According to the Bureau of Labor Statistics, employment of personal financial advisors is projected to grow 15 percent until 2026, a rate that is much higher than the average for all occupations. Furthermore, the retirement of many older financial planners combined with the transfer of an estimated \$30 trillion over the next decades from baby boomers to Gen Xers and millennials necessitates the need of a new generation of financial planners and advisors. This demand for financial planners can, in my opinion, be best met by high quality undergraduate financial planning degree programs.

While I am stepping down as the Director of UNF's Financial Planning Program effective May 1, I have no doubt that our incoming director will be in favor of collaborating with the USF program to advance the financial planning profession in our respective communities and the State of Florida.

Should you have any additional questions, please feel free to contact me at oschnuse@unf.edu or at (904) 982-6070.

Cordially,

Oliver Schnusenberg, Ph.D., CFP®
Professor of Finance
Director, UNF Financial Planning Program

THE POWER OF
TRANSFORMATION
Campaign for the UNIVERSITY of NORTH FLORIDA

Building 42, Room 3001, 1 UNF Drive, Jacksonville, Florida 32224-7699
Tel: (904) 620.2630 Fax: (904) 620.3861

Appendix D: Academic Learning Compact

PERSONAL FINANCIAL PLANNING

Program Mission Statement

The Personal Financial Planning program emphasizes creativity and analytics to promote student success and engage with all stakeholders in a diverse and ever-changing professional environment.

Vision Statement

Transforming minds: Transforming lives. We aspire to be internationally recognized for developing financial planning professionals who provide analytical and creative solutions to transform the lives and well-being of the clients they serve.

Strategic Priorities:

1. Distinctive identity

Financial analytics and Creative Solutions to create financial plans to improve success.

2. Research with Impact

Research opportunities in this new field are abundant and widely sought. Quality publications looking for peer-reviewed scientific research are: (1) Journal of Financial Planning, (2) Journal of Personal Finance, (3) Journal of Financial Counseling and Planning, (4) Financial Services Review, (5) Journal of Consumer Affairs, (6) Journal of Financial Service Professional and (7) Journal of Financial Therapy. There are also numerous grant opportunities due to direct impact on the well-being of the individual, the household and society. We will contribute to the body of knowledge via innovative and interdisciplinary approaches to creating useful insights for the financial services industry and to promote the well-being of individuals and the community.

3. Student Success

We will equip our students with the knowledge and skills necessary to become analytical and creative problem-solvers, thereby allowing them to add significant value to clients, the community and their employing organizations. We will focus on honing students' skills through innovative pedagogical approaches and experiential learning opportunities. We will look to place every student in a Financial Services firm prior to graduation.

4. Business engagement

We will partner with Financial Services Industry worldwide to seek and provide ideas, solutions, and intellectual capital. An advisory council will assist in various initiatives and will provide internship/residency opportunities for the students while in school. With strong business relationships everyone wins: students, business and faculty.

5. People

We will reach our full potential only if our people are motivated, committed, and engaged. We strive to create and sustain a healthy work environment that values passion, accountability, personal development, openness, and collaboration.

6. Global Literacy and Impact

Appendix D: Academic Learning Compact

The Personal Financial Planning Profession is growing all over the world. We will foster relationships promoting international faculty and student exchanges. We will strengthen our relationship with Financial Services firms, our study abroad offerings, internationally delivered programs and attract quality international students to our college. Our students' global literacy will be increased through the incorporation of global issues into the curriculum.

Program Objectives

The Personal Financial Planning program is intended to provide students with an understanding of the key concepts required to make financial decisions for individuals, households, small businesses and the community. The curriculum has been designed so that the course structure remains current in a field that is evolving. In addition, the curriculum provides the flexibility to help students prepare for specific finance-related jobs in financial services, investments, and financial institutions, as well as for advanced study in personal finance.

In addition to major requirements, all students must complete the business core curriculum, which consists of a series of courses that provides a foundation of business knowledge necessary for all majors.

Goal 1: Discipline Specific Knowledge and Skills

Learning Objectives

- Graduates will demonstrate an ability to identify and recall a comprehensive list of financial tools and concepts and the ability to apply them in a problem-solving context.
- Students will demonstrate critical thinking and analytical abilities, including the capability to engage in inductive, deductive, and quantitative reasoning and to construct sound arguments.

Method of Assessment

Students will be assessed in the capstone course, Personal Financial Planning Process and Development Capstone (FIN 4128), through the use of comprehensive individual and team cases and projects. Various cases and projects will be used to determine whether students understand and can apply the concepts and tools that are related to:

1. Demonstrate comprehensive understanding of the content found within the Financial Planning curriculum and be able to effectively apply and integrate this information in the formulation of a financial plan.
2. Collect all necessary and relevant qualitative and quantitative information required to develop a financial plan.
3. Analyze personal financial situations, evaluating clients' objectives, needs, and values to develop an appropriate strategy within the financial plan.
4. Demonstrate logic and reasoning to identify the strengths and weaknesses of various approaches to a specific problem.
5. Evaluate the impact of economic, political, and regulatory issues with regard to the financial plan.

Cases and projects will be evaluated by at least two faculty/industry members who either teach in the undergraduate program or work in the financial services industry. A standardized rating scale will be used to identify the areas in which students excel and those areas in which their understanding is weak. Program faculty will work with the Office of Institutional Effectiveness and

Appendix D: Academic Learning Compact

Assessment to measure and monitor inter-rater reliability.

Performance Targets

Students are expected to score within 70 percent of available points or above on each item in the rating scale.

Goal 2: Critical Thinking

Learning Objectives

Graduates will demonstrate the ability to evaluate important financial situations and decision-making processes of individuals, businesses and communities to provide viable solutions to benefit individuals.

Method of Assessment

Students will be assessed in the capstone course, Personal Financial Planning Process and Development Capstone (FIN 4128), through the use of comprehensive individual and team cases and projects. Various cases and projects will be used to determine whether students understand and can apply the concepts and tools that are related to:

1. Demonstrate comprehensive understanding of the content found within the Financial Planning curriculum and be able to effectively apply and integrate this information in the formulation of a financial plan.
2. Collect all necessary and relevant qualitative and quantitative information required to develop a financial plan.
3. Analyze personal financial situations, evaluating clients' objectives, needs, and values to develop an appropriate strategy within the financial plan.
4. Demonstrate logic and reasoning to identify the strengths and weaknesses of various approaches to a specific problem.
5. Evaluate the impact of economic, political, and regulatory issues with regard to the financial plan.

Cases and projects will be evaluated by at least two faculty/industry members who either teach in the undergraduate program or work in the financial services industry. A standardized rating scale will be used to identify the areas in which students excel and those areas in which their understanding is weak. Program faculty will work with the Office of Institutional Effectiveness and Assessment to measure and monitor inter-rater reliability.

Performance Targets

Students are expected to score within 70 percent of available points or above on each item in the rating scale.

Goal 3: Communication Skills

Learning Objectives

Graduates will demonstrate the ability communicate effectively, both on an individual basis and in collaboration with others, with individuals, finance professionals, government services and community leaders as well as with other stakeholders.

Appendix D: Academic Learning Compact

Method of Assessment

Students will be assessed in the capstone course, Personal Financial Planning Process and Development Capstone (FIN 4128), through the use of comprehensive individual and team cases and projects. Students will be required to provide both written and oral presentations of specific cases. Oral and written cases and projects will be evaluated by at least two faculty members teaching in the program. A standardized rating scale will be used to identify the areas in which students excel and those areas in which their understanding is weak. Program faculty will work with the Office of Institutional Effectiveness and Assessment to measure and monitor inter-rater reliability.

Performance Targets

Students are expected to score within 70 percent of available points or above on each item in the rating scale.

Goal 4: CFP Board Financial Planning Practice Standards and Ethics

Learning Objectives

Graduates will demonstrate the application of the CFP Board Financial Planning Practice Standards to the financial planning process and the importance of using an ethical framework when making life altering recommendations to clients.

Method of Assessment

Students will be assessed in the capstone course, Personal Financial Planning Process and Development Capstone (FIN 4128), through the use of comprehensive individual and team cases and projects. Students will be required to apply the CFP Board Financial Planning Practice Standards and ethics to the financial planning process. A standardized rating scale will be used to identify the areas in which students excel and those areas in which their understanding is weak. Program faculty will work with the Office of Institutional Effectiveness and Assessment to measure and monitor inter-rater reliability.

Performance Targets

Students are expected to score within 70 percent of available points or above on each item in the rating scale.

Appendix D: Eight-Semester Plan

<p>Undergraduate Eight-Semester Plan</p> <p>CIP Code: 52.0804</p> <p>CIP Title: Financial Planning and Services</p> <p>Degree Level: B</p>

Credential (Degree Type): B.S.
USF Title (Major Name): Personal Financial Planning

For any course and/or placeholder that must be taken in sequence and/or in the semester listed, please indicate such by inserting a (!) in the appropriate cell.

Fall 1						
!	Current Course Prefix and Number	Course Type	State Mandated Common Prerequisite	Enhanced General Education Requirement	Course Requirement	Total
!	ENC 1101		No	Yes	State Core General Education Communication	3
!	MAC 2233		Yes	Yes	State Core General Education Mathematics	3
!	CGS 2100		Yes	Yes	Enhanced General Education Information and Digital Literacy	3
	SPC 2608 or COM 3110	Supporting Course	No	No		3
	Non-Business Elective	General/Unrestricted Elective	No	No		3
		Placeholder: Take the Civics Literacy Exam			Civics Literacy	
Total Semester Credit Hours:						15

Spring 1						
!	Current Course Prefix and Number	Course Type	State Mandated Common Prerequisite	Enhanced General Education Requirement	Course Requirement	Total

Appendix D: Eight-Semester Plan

!	ENC 1102		No	Yes	Enhanced General Education ENC 1102	3
!	ECO 2013		Yes	Yes	State Core General Education Social Sciences	3
	SGEN		No	Yes	State Core General Education Natural Sciences	3
	SGEH		No	Yes	State Core General Education Humanities	3
	Non-Business Elective	General/Unrestricted Elective	No	No		3
Total Semester Credit Hours:						15

Summer 1						
!	Current Course Prefix and Number	Course Type	State Mandated Common Prerequisite	Enhanced General Education Requirement	Course Requirement	Total
Total Term Credit Hours:						0

Fall 2						
!	Current Course Prefix and Number	Course Type	State Mandated Common Prerequisite	Enhanced General Education Requirement	Course Requirement	Total
!	ACG 2021		Yes	No		3
!	ECO 2023		Yes	Yes	Enhanced General Education Creative Thinking	3
	Non-Business Elective	General/Unrestricted Elective	No	No		3
	Non-Business Elective	General/Unrestricted Elective	No	No		3
	Non-Business Elective	General/Unrestricted Elective	No	No		3
Total Semester Credit Hours:						15

Spring 2						
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Appendix D: Eight-Semester Plan

!	Current Course Prefix and Number	Course Type	State Mandated Common Prerequisite	Enhanced General Education Requirement	Course Requirement	Total
!	ACG 2071		Yes	No		3
!	QMB 2100		Yes	Yes	6A State Computation	3
	ISM 3011	Business Foundation Course	No	No		3
	GEB 3033	Business Foundation Course	No	No		3
	Non-Business Elective	General/Unrestricted Elective	No	No		3
Total Semester Credit Hours:						15

Summer 2						
!	Current Course Prefix and Number	Course Type	State Mandated Common Prerequisite	Enhanced General Education Requirement	Course Requirement	Total
!	FIN 3403	Business Foundation Course	No	No		3
	MAR 3023	Business Foundation Course	No	No		3
Total Term Credit Hours:						6

Fall 3						
!	Current Course Prefix and Number	Course Type	State Mandated Common Prerequisite	Enhanced General Education Requirement	Course Requirement	Total
!	FIN 3144	Major Core	No	No		3
	QMB 3200	Business Foundation Course	No	No		3
	BUL 3320	Business Foundation Course	No	Yes	Enhanced General Education Human and Cultural Diversity	3
	MAN 3025	Business Foundation Course	No	No		3
	Non-Business Elective	General/Unrestricted Elective	No	No		3
Total Semester Credit Hours:						15

Appendix D: Eight-Semester Plan

Spring 3						
!	Current Course Prefix and Number	Course Type	State Mandated Common Prerequisite	Enhanced General Education Requirement	Course Requirement	Total
!	TAX 4001	Major Core	No	No		3
!	FIN 4504	Major Core	No	No		3
	MAN 4504	Business Foundation Course	No	No		3
	ENC 3250 or ENC 3310	Supporting Course	No	No		3
Total Semester Credit Hours:						12

Summer 3						
!	Current Course Prefix and Number	Course Type	State Mandated Common Prerequisite	Enhanced General Education Requirement	Course Requirement	Total
!	RMI 4135	Major Core	No	No		3
Total Term Credit Hours:						3

Fall 4						
!	Current Course Prefix and Number	Course Type	State Mandated Common Prerequisite	Enhanced General Education Requirement	Course Requirement	Total
!	RMI 3011	Major Core	No	No		3
!	FIN 4132	Major Core	No	No		3
	TGEH		No	Yes	Enhanced General Education High Impact Practice Internship	3
	General Elective (Recommended: Internship)	General/Unrestricted Elective	No	No		3
		Placeholder: Apply for Graduation				
Total Semester Credit Hours:						12

Appendix D: Eight-Semester Plan

Spring 4						
!	Current Course Prefix and Number	Course Type	State Mandated Common Prerequisite	Enhanced General Education Requirement	Course Requirement	Total
!	FIN 4128	Major Core	No	No		3
!	GEB 4890	Business Foundation Course	No	No		3
	COB International Course	Additional Requirement	No	No		3
	TGEE		No	Yes	Enhanced General Education Ethical Reasoning and Civic Engagement Capstone	3
Total Semester Credit Hours:						12

Total Degree Program Credit Hours:	120
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Appendix D: Four-Semester Plan

<p><u>Undergraduate Transfer Four-Semester Plan</u></p> <p>CIP Code: 52.0804</p> <p>CIP Title: Financial Planning and Services</p> <p>Degree Level: B</p>

Credential (Degree Type): B.S.
USF Title (Major Name): Personal Financial Planning

For any course and/or placeholder that must be taken in sequence and/or in the semester listed, please indicate such by inserting a (!) in the appropriate cell.

Fall 1						
!	Current Course Prefix and Number	Course Type	State Mandated Common Prerequisite	Enhanced General Education Requirement	Course Requirement	Total
!	FIN 3403	Business Foundation Course	No	No		3
!	GEB 3033	Business Foundation Course	No	No		3
	ISM 3011	Business Foundation Course	No	No		3
	MAR 3023	Business Foundation Course	No	No		3
	SPC 2608 or COM 3110	Supporting Course	No	No		3
Total Semester Credit Hours:						15

Spring 1						
!	Current Course Prefix and Number	Course Type	State Mandated Common Prerequisite	Enhanced General Education Requirement	Course Requirement	Total
!	TAX 4001	Major Core	No	No		3

Appendix D: Four-Semester Plan

!	FIN 4504	Major Core	No	No		3
	QMB 3200	Business Foundation Course	No	No		3
	MAN 3025	Business Foundation Course	No	No		3
	ENC 3250 or ENC 3310	Supporting Course	No	No		3
Total Semester Credit Hours:						15

Summer 1						
!	Current Course Prefix and Number	Course Type	State Mandated Common Prerequisite	Enhanced General Education Requirement	Course Requirement	Total
!	FIN 3144	Major Core	No	No		3
	BUL 3320	Business Foundation Course	No	Yes		3
Total Term Credit Hours:						6

Fall 2						
!	Current Course Prefix and Number	Course Type	State Mandated Common Prerequisite	Enhanced General Education Requirement	Course Requirement	Total
!	RMI 4135	Major Core	No	No		3
!	RMI 3011	Major Core	No	No		3
	MAN 4504	Business Foundation Course	No	No		3
	COB International Course	Additional Requirement	No	No		3
		Placeholder: Apply for Graduation				

Appendix D: Four-Semester Plan

Total Semester Credit Hours:						12

Spring 2						
!	Current Course Prefix and Number	Course Type	State Mandated Common Prerequisite	Enhanced General Education Requirement	Course Requirement	Total
!	FIN 4132	Major Core	No	No		3
!	FIN 4128	Major Core	No	No		3
!	GEB 4890	Business Foundation Course	No	No		3
	General Elective	General/Unrestricted Elective	No	No		3
Total Semester Credit Hours:						12

Total Credit Hours:						60
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VALIDATE: EMPLOYMENT POTENTIAL

PROJECT CRITERIA

Validate	Programs
States	Florida
Metro Areas (MSAs)	Tampa-St. Petersburg-Clearwater, FL
Degree Level	Bachelor's degree
Time Period	7/1/2018 - 6/30/2019
Selected Programs	Financial Planning and Services (52.0804)
Career Outcomes mapped to Selected Programs of Study	Personal Banker / Banking Sales Staff, Financial Services Sales Agent, Securities / Commodities Trader, Credit / Loan Counselor, Tax Preparer, Financial Quantitative Analyst, Personal Financial Advisor, Risk Manager / Analyst, Investment Underwriter, Treasurer / Controller, Banking Branch Manager, Tax Analyst / Specialist, Tax Manager, Budget Analyst, Credit Analyst / Authorizer, Financial Analyst, Financial Manager

HOW MANY JOBS ARE THERE FOR YOUR GRADUATES?

For your project criteria, there were **28,741** job postings in the last 12 months.

Compared to:

- 1,684,127 total job postings in your selected location
- 568,408 total job postings requesting a Bachelor's degree in your selected location

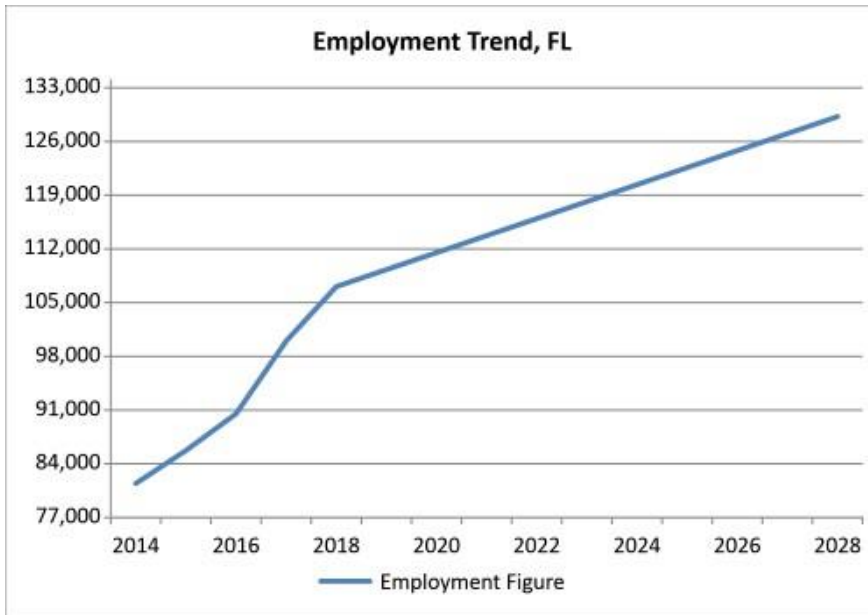
The number of jobs is expected to **grow** over the next 8 years.

GROWTH BY GEOGRAPHY

Geography	Selected Occupations	Total Labor Market	Relative Growth
Tampa, FL	20.72%	12.83%	High
Florida	20.69%	13.15%	High
Nationwide	12.15%	5.78%	High

HOW HAS EMPLOYMENT CHANGED FOR CAREER OUTCOMES OF YOUR PROGRAM?

	2014	2015	2016	2017	2018	2028
Employment (BLS)	81,440	85,740	90,520	100,000	107,090	129,246



Employment data between years 2019 and 2028 are projected figures.

DETAILS BY OCCUPATION

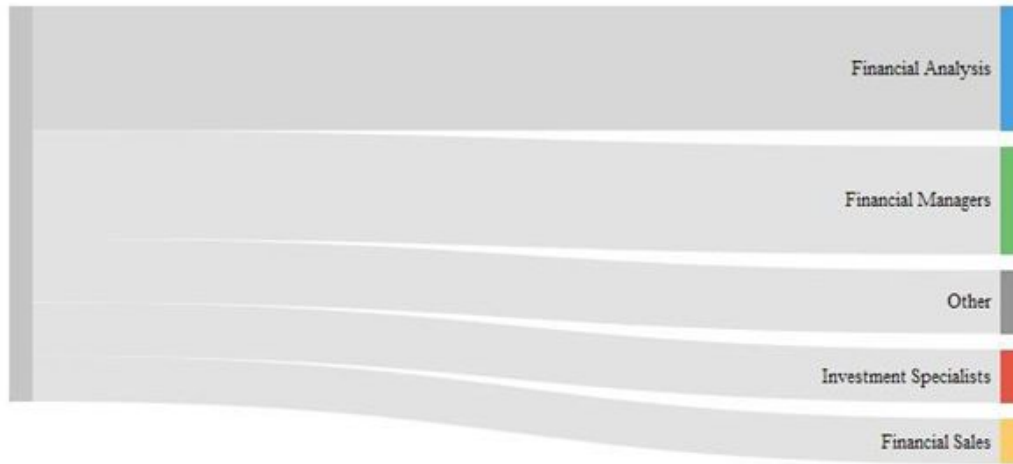
Occupation Group	Postings	LQ	Employment (2018)	Employment Growth (2017 - 2018)	Projected Employment Growth (2019-2028)
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Financial Analysis	9,045	0.8	25,900	6.0%	17.4%
Financial Managers	7,876	0.8	29,050	16.0%	29.5%
Investment Specialists	3,895	1.0	48,050	1.1%	18.1%
Financial Sales	3,316	0.9	27,560	-1.3%	14.6%
Accounting Professionals	2,062	0.9	32,720	13.6%	26.4%
Banking and Lending	1,968	0.9	31,760	14.2%	28.8%
Accounting Support	579	0.8	4,120	18.7%	22.3%

HOW VERSATILE IS MY PROGRAM?

Graduates of this program usually transition into any of the 7 different occupation groups:

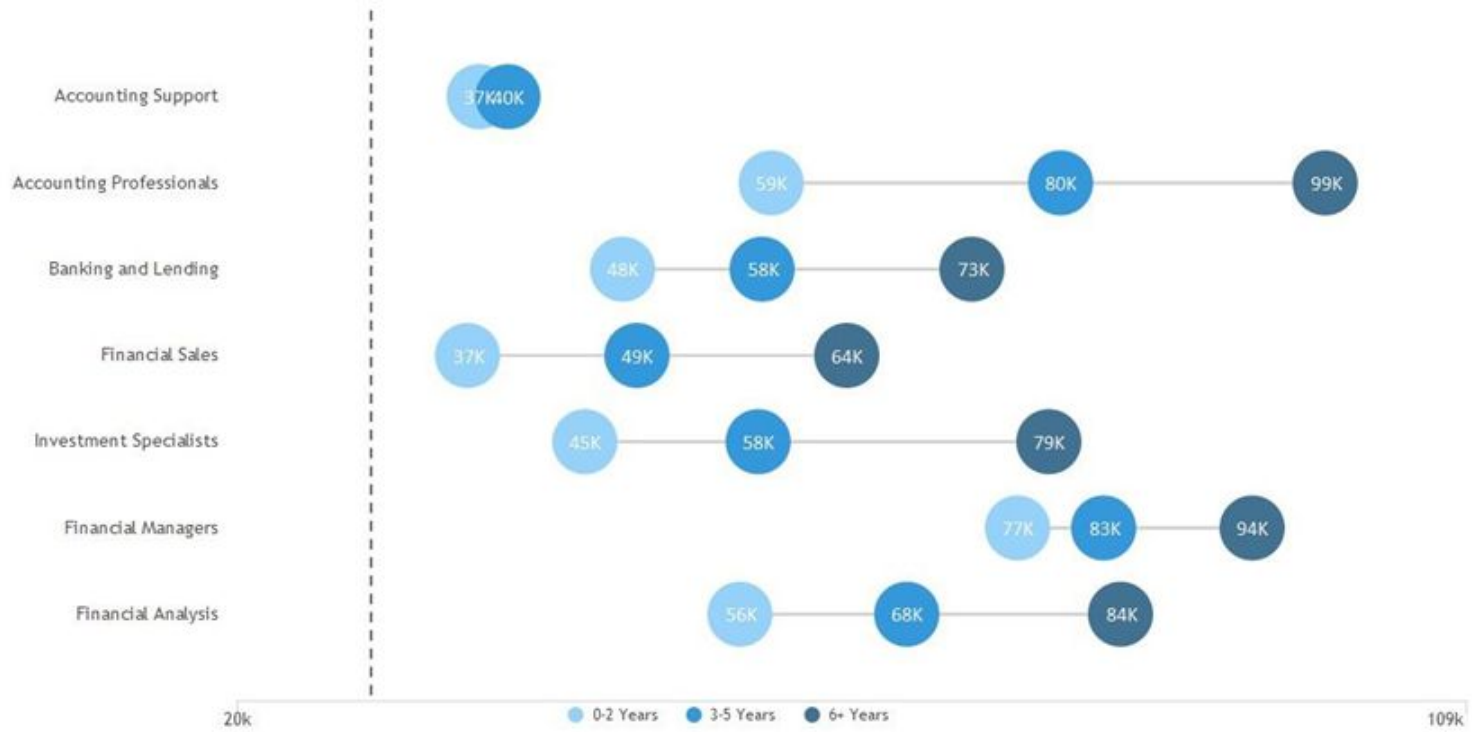
Occupations Group	Market Size (postings)	Percentage of Career Outcome demand
Financial Analysis	9,045	31.5%
Financial Managers	7,876	27.4%
Investment Specialists	3,895	13.6%
Financial Sales	3,316	11.5%
Accounting Professionals	2,062	7.2%
Banking and Lending	1,968	6.8%
Accounting Support	579	2.0%



WHAT SALARY WILL MY GRADUATES MAKE?

The average salary in Florida for graduates of your program is \$68,239

This average salary is Above the average living wage for Florida of \$29,619



Salary numbers are based on Burning Glass models that consider advertised job posting salary, BLS data, and other proprietary and public sources of information.

Occupation Group	25 th Percentile	Average	75 th Percentile
Financial Analysis	\$56,442	\$68,495	\$84,053
Financial Managers	\$76,511	\$82,810	\$93,551
Investment Specialists	\$45,155	\$57,732	\$78,804
Financial Sales	\$36,704	\$48,916	\$64,165
Banking and Lending	\$47,884	\$58,073	\$73,265
Accounting Professionals	\$58,662	\$79,664	\$98,872
Accounting Support	\$37,484	\$39,610	\$0

WHERE IS THE DEMAND FOR MY GRADUATES?



TOP LOCATIONS BY POSTING DEMAND

Location	Postings
California	86,549
Texas	42,264

New York	39,188
Florida	28,640
Illinois	21,915
Massachusetts	17,973
Ohio	17,501
Pennsylvania	17,066
North Carolina	16,432
Virginia	15,967

VALIDATE: COMPETITIVE LANDSCAPE

PROJECT CRITERIA

Validate	Programs
States	Florida
Metro Areas (MSAs)	Tampa-St. Petersburg-Clearwater, FL
Degree Level	Bachelor's degree
Time Period	7/1/2018 - 6/30/2019
Selected Programs	Financial Planning and Services (52.0804)
Career Outcomes mapped to Selected Programs of Study	Personal Banker / Banking Sales Staff, Financial Services Sales Agent, Securities / Commodities Trader, Credit / Loan Counselor, Tax Preparer, Financial Quantitative Analyst, Personal Financial Advisor, Risk Manager / Analyst, Investment Underwriter, Treasurer / Controller, Banking Branch Manager, Tax Analyst / Specialist, Tax Manager, Budget Analyst, Credit Analyst / Authorizer, Financial Analyst, Financial Manager

OVERVIEW

	#	% Change (2013-2017)
Number of Institutions	0	0%

Average Conferrals by Institution	0	0.00%
Median Conferrals by Institution	0	0.00%

MARKET SHARE BY PROGRAM

Program	Conferrals (2017)	Market Share (%)
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MARKET SHARE BY INSTITUTION TYPE

Institution Type	Conferrals (2017)	Market Share (%)
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TOP INSTITUTIONS

Institution	School Type	Market Share (2017)	Market Share Change	Conferrals (2017)	Conferrals Change (2013-2017)
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TOP PROGRAMS

Program	Market Share (2017)	Market Share Change	Conferrals (2017)	Conferrals Change (2013-2017)
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ACTIVE COMPETITORS

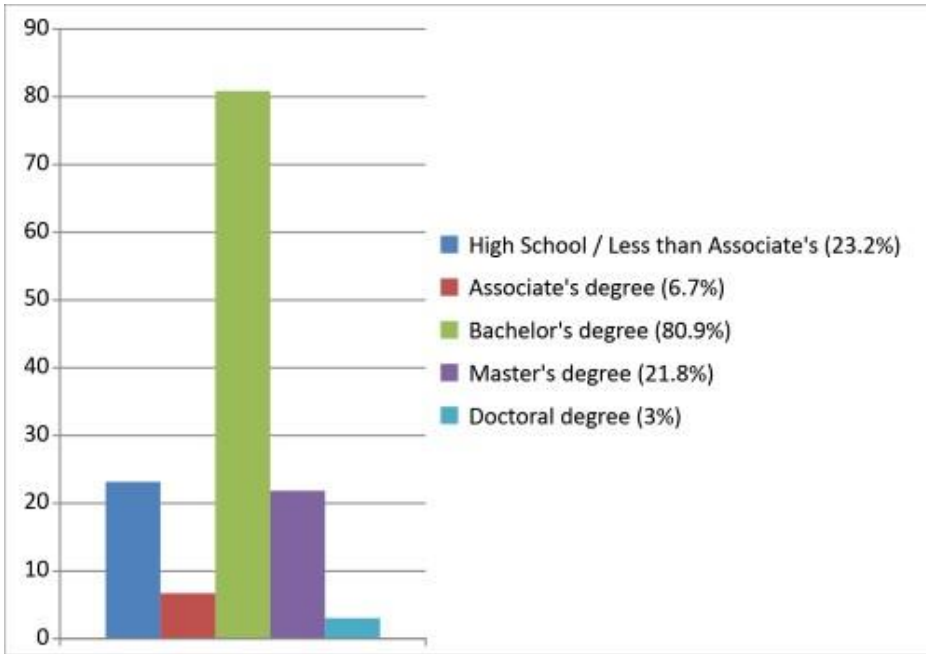
Institution	School Type	Market Share (2017)	Market Share Change	Conferrals (2017)	Conferrals Change (2013-2017)
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VALIDATE: MARKET ALIGNMENT

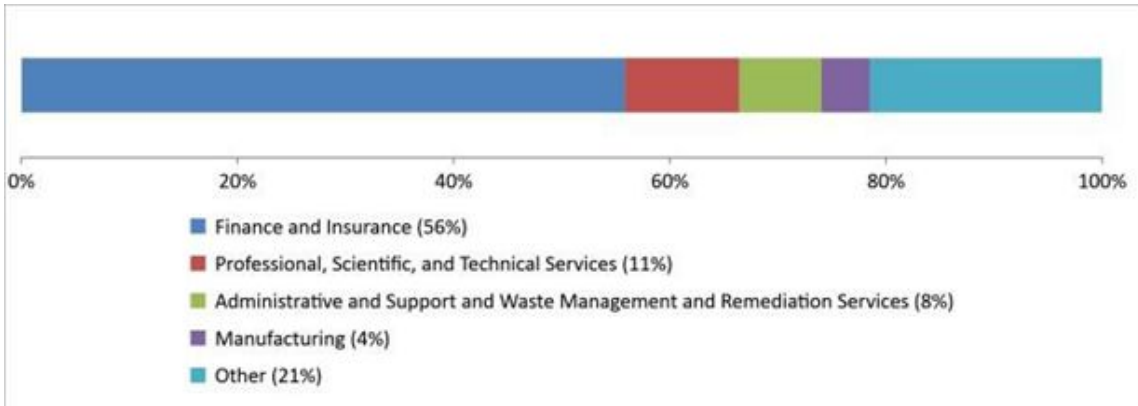
PROJECT CRITERIA

Validate	Programs
States	Florida
Metro Areas (MSAs)	Tampa-St. Petersburg-Clearwater, FL
Degree Level	Bachelor's degree
Time Period	7/1/2018 - 6/30/2019
Selected Programs	Financial Planning and Services (52.0804)
Career Outcomes mapped to Selected Programs of Study	Personal Banker / Banking Sales Staff, Financial Services Sales Agent, Securities / Commodities Trader, Credit / Loan Counselor, Tax Preparer, Financial Quantitative Analyst, Personal Financial Advisor, Risk Manager / Analyst, Investment Underwriter, Treasurer / Controller, Banking Branch Manager, Tax Analyst / Specialist, Tax Manager, Budget Analyst, Credit Analyst / Authorizer, Financial Analyst, Financial Manager

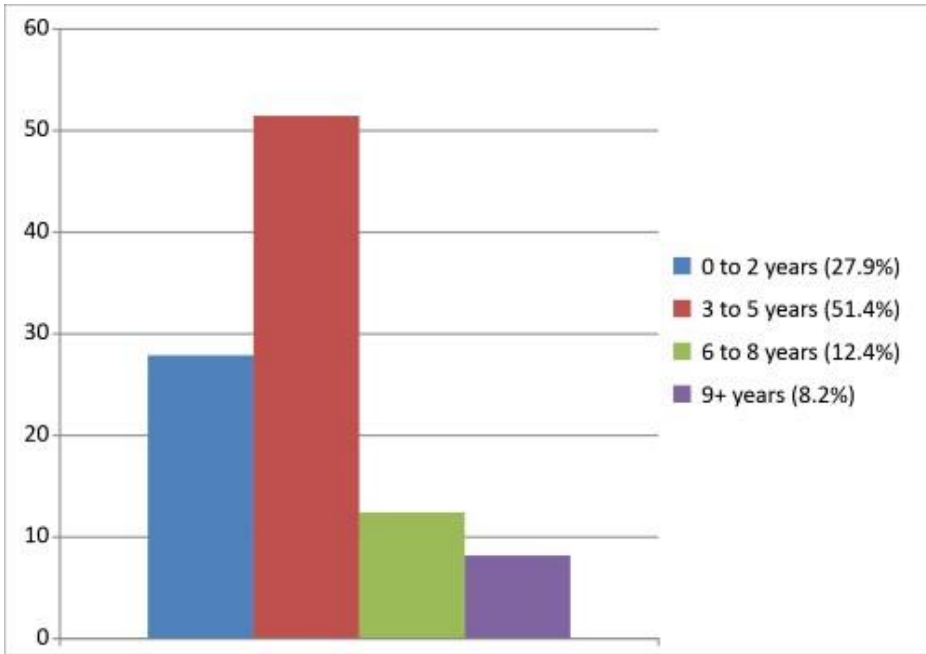
JOB POSTINGS BY ADVERTISED EDUCATION (%)



JOB POSTINGS BY INDUSTRY (%)



JOB POSTINGS BY EXPERIENCE REQUESTED (%)



TOP TITLES

Experience Level: All Experience

Title	Postings	Market Share (%)
Financial Analyst	2,610	12.11%
Accounting Manager	1,030	4.78%
Senior Financial Analyst	816	3.79%
Controller	786	3.65%
Financial Consultant	782	3.63%
Financial Advisor	773	3.59%
Tax Manager	706	3.28%
Relationship Banker	628	2.91%

Banker	605	2.81%
Branch Manager	521	2.42%
Director of Finance	443	2.06%
Tax Professional	432	2.01%
Assistant Controller	406	1.88%
Credit Analyst	261	1.21%
Risk Manager	255	1.18%

TOP EMPLOYERS HIRING

Experience Level: All Experience

Employer	Postings	Market Share (%)
Bank of America	1,369	6.35%
JP Morgan Chase Company	801	3.72%
Regions Financial Corporation	598	2.78%
H&R Block	501	2.33%
Citi	368	1.71%
Raymond James Financial Incorporated	348	1.62%
BB&T Corporation	292	1.36%
The PNC Financial Services Group, Inc.	229	1.06%

U.S. Bancorp	168	0.78%
Fifth Third Bank	160	0.74%
PricewaterhouseCoopers	148	0.69%
Anthem Blue Cross	133	0.62%
Fidelity Brokerage Services	131	0.61%
University of Miami	109	0.51%
Morgan Stanley	99	0.46%

VALIDATE: KEY COMPETENCIES

PROJECT CRITERIA

Validate	Programs
States	Florida
Metro Areas (MSAs)	Tampa-St. Petersburg-Clearwater, FL
Degree Level	Bachelor's degree
Time Period	7/1/2018 - 6/30/2019
Selected Programs	Financial Planning and Services (52.0804)
Career Outcomes mapped to Selected Programs of Study	Personal Banker / Banking Sales Staff, Financial Services Sales Agent, Securities / Commodities Trader, Credit / Loan Counselor, Tax Preparer, Financial Quantitative Analyst, Personal Financial Advisor, Risk Manager / Analyst, Investment Underwriter, Treasurer / Controller, Banking Branch Manager, Tax Analyst / Specialist, Tax Manager, Budget Analyst, Credit Analyst / Authorizer, Financial Analyst, Financial Manager

TOP 15 SPECIALIZED SKILLS

Skill	Postings	Projected Growth	Salary Premium	Competitive Advantage
Accounting	10321 (36%)	-5.76%	No	No

Board of Trustees Regular Meeting - New Business - Consent Agenda

Budgeting	7995 (28%)	-10.04%	No	No
Financial Analysis	6589 (23%)	-8.29%	No	No
Financial Reporting	4538 (16%)	-16.31%	No	No
Customer Service	4507 (16%)	1.05%	No	No
Sales	3931 (14%)	-11.17%	No	No
Financial Statements	3624 (13%)	-24.63%	No	No
Customer Contact	3496 (12%)	-11.38%	No	No
Scheduling	2830 (10%)	1.88%	No	No
Generally Accepted Accounting Principles (GAAP)	2625 (9%)	-13.97%	No	No
Finance	2607 (9%)	4.36%	No	No
Public Accounting	2501 (9%)	-19.36%	Yes	No
Account Reconciliation	2373 (8%)	1.69%	No	No

Nationwide Mortgage Licensing System (NMLS)	2369 (8%)	47.74%	No	No
Staff Management	2302 (8%)	-13.84%	No	No

TOP 15 BASELINES SKILLS

Skill	Postings
Communication Skills	12447 (43%)
Microsoft Excel	8945 (31%)
Planning	6537 (23%)
Problem Solving	5901 (21%)
Building Effective Relationships	5602 (20%)
Microsoft Office	5456 (19%)
Teamwork / Collaboration	4810 (17%)

Organizational Skills	4624 (16%)
Detail-Oriented	4299 (15%)
Research	4170 (15%)
Written Communication	3671 (13%)
Computer Literacy	3577 (12%)
Writing	3310 (12%)
Microsoft Powerpoint	3146 (11%)
Multi-Tasking	2908 (10%)

TOP 15 SOFTWARE PROGRAMMING SKILLS

Skill	Postings	Projected Growth	Salary Premium	Competitive Advantage
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Microsoft Excel	8945 (31%)	17.03%	No	No
Microsoft Office	5456 (19%)	-10.2%	No	No
Microsoft Powerpoint	3146 (11%)	-8.52%	No	No
Microsoft Word	2288 (8%)	-13.39%	No	No
SAP	1353 (5%)	33.72%	No	No
Enterprise Resource Planning (ERP)	1266 (4%)	-8.06%	No	No
Oracle	992 (3%)	-16.26%	No	No
SQL	919 (3%)	-13.3%	No	No
Microsoft Access	889 (3%)	-57.74%	No	No
Pivot Tables	868 (3%)	6.5%	No	No
Hyperion	861 (3%)	-36.08%	No	No
Quickbooks	640 (2%)	-31.24%	No	No

Accounting Software	500 (2%)	15.94%	No	No
Peoplesoft	432 (2%)	3.97%	No	No
Microsoft Outlook	419 (1%)	-1.45%	No	No

TOP 15 SKILL CLUSTERS

Skill	Postings
General Accounting	12014 (42%)
Microsoft Office and Productivity Tools	9058 (32%)
Financial Analysis	8177 (29%)
Budget Management	8157 (28%)
Financial Reporting	7908 (28%)
Basic Customer Service	7788 (27%)

General Sales	5375 (19%)
Investment Management	4125 (14%)
Auditing	3789 (13%)
Financial Advisement	3623 (13%)
People Management	3595 (13%)
Business Process and Analysis	3581 (13%)
Business Strategy	3542 (12%)
Financial Management	3466 (12%)
Enterprise Resource Planning (ERP)	3336 (12%)

TOP 15 SALARY PREMIUM SKILLS

Skill	Postings	Projected Growth	Salary Premium	Competitive Advantage
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Public Accounting	2501 (9%)	-19.36%	Yes	No
Project Management	2052 (7%)	-19.74%	Yes	No
Business Development	1983 (7%)	-8.98%	Yes	Yes
Sarbanes-Oxley (SOX)	714 (2%)	-35.52%	Yes	Yes
Asset Management Industry Knowledge	608 (2%)	-4.62%	Yes	No

TOP 15 COMPETITIVE ADVANTAGE SKILLS

Skill	Postings	Projected Growth	Salary Premium	Competitive Advantage
Business Development	1983 (7%)	-8.98%	Yes	Yes
Sarbanes-Oxley (SOX)	714 (2%)	-35.52%	Yes	Yes

TOP 15 CERTIFICATIONS

Skill	Postings	Salary Premium	Competitive Advantage
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Certified Public Accountant (CPA)	6207 (22%)	Yes	Yes
Series 7	2121 (7%)	No	No
Insurance License	1219 (4%)	No	No
Certified Financial Planner (CFP)	933 (3%)	No	No
Insurance Agent Certification	909 (3%)	No	No
Series 6	882 (3%)	No	No
Series 66	758 (3%)	No	No
Mortgage License	608 (2%)	No	No
Driver's License	574 (2%)	No	No
Series 65	378 (1%)	No	No
Investment Advisor	358 (1%)	No	No
Series 63	299 (1%)	No	No

Security Clearance	252 (1%)	No	No
Project Management Certification	211 (1%)	No	No
Securities License	196 (1%)	No	No

TOP 15 SALARY PREMIUM CERTIFICATIONS

Skill	Postings	Salary Premium	Competitive Advantage
Certified Public Accountant (CPA)	6207 (22%)	Yes	Yes

TOP 15 COMPETITIVE ADVANTAGE CERTIFICATIONS

Skill	Postings	Salary Premium	Competitive Advantage
Certified Public Accountant (CPA)	6207 (22%)	Yes	Yes

Appendix F: Support for Program

71 TOPIC LIST PROVIDES A BLUEPRINT FOR THE CFP® CERTIFICATION EXAMINATION AND THE CURRICULAR FRAMEWORK FOR THE BS/PFP PROGRAM AS A CFP BOARD REGISTERED PROGRAMS.

A. Professional Conduct and Regulation	Course Number
A.1 CFP Board's Code of Ethics and Professional Responsibility and Rules of Conduct	FIN 3144
A.2 CFP Board's Financial Planning Practice Standards	FIN 3144
A.3 CFP Board's Disciplinary Rules and Procedures	FIN 3144
A.4 Function, purpose, and regulation of financial institutions	FIN 3144
A.5 Financial services regulations and requirements	FIN 3144
A.6 Consumer protection laws	FIN 3144
A.7 Fiduciary	FIN 3144
B. General Principles and Regulation	Course Number
B.1 Financial planning process	FIN 3144
B.2 Financial statements	FIN 3144
B.3 Cash flow management	FIN 3144
B.4 Financing strategies	FIN 4128
B.5 Economic concepts	FIN 3144
B.6 Time value of money concepts and calculations	FIN 3144
B.7 Client and planner attitudes, values, biases and behavioral finance	FIN 4128
B.8 Principles of communication and counseling	FIN 4128
B.9 Debt management	Fin 4128
C. Education Planning	Course Number
C.1 Education needs analysis	FIN 3144
C.2 Education savings vehicles	FIN 3144
C.3 Financial aid	FIN 3144
C.4 Gift/income tax strategies	FIN 4128
C.5 Education financing	FIN 3144, FIN 4128
D. Risk Management and Insurance Planning	Course Number
D.1 Principles of risk and insurance	RMI 3011
D.2 Analysis and evaluation of risk exposures	RMI 3011

Appendix F: Support for Program

D.3	Health insurance and health care cost management (individual)	RMI 3011
D.4	Disability income insurance (individual)	RMI 3011
D.5	Long-term care insurance (individual)	RMI 3011
D.6	Annuities	RMI 3011
D.7	Life insurance (individual)	RMI 3011
D.8	Business uses of insurance	RMI 3011
D.9	Insurance needs analysis	RMI 3011, FIN 4128
D.10	Insurance policy and company selection	RMI 3011
D.11	Property and casualty insurance	RMI 3011
E.	Investment Planning	Course Number
E.1	Characteristics, uses and taxation of investment vehicles	FIN 4504, TAX 4001
E.2	Types of investment risk	FIN 3144, FIN 4504
E.3	Measures of investment returns	FIN 4504
E.4	Asset allocation and portfolio diversification	FIN 4504
E.5	Bond and stock valuation concepts	FIN 4504
E.6	Portfolio development and analysis	FIN 4504
E.7	Investment strategies	FIN 4504
E.8	Alternative investments	FIN 4504
F.	Tax Planning	Course Number
F.1	Fundamental tax law	TAX 4001
F.2	Income tax fundamentals and calculations	TAX 4001
F.3	Characteristics and income taxation of business entities	TAX 4001
F.4	Income taxation of trusts and estates	TAX 4001
F.5	Alternative minimum tax (AMT)	TAX 4001
F.6	Tax reduction/management techniques	TAX 4001
F.7	Tax consequences of property transactions	TAX 4001
F.8	Passive activity and at-risk rules	TAX 4001
F.9	Tax implications of special circumstances	TAX 4001
F.10	Charitable/philanthropic contributions and deductions	TAX 4001

Appendix F: Support for Program

G. Retirement Savings and Income Planning	Course Number
G.1 Retirement needs analysis	RMI 4135
G.2 Social Security and Medicare	RMI 4135
G.3 Medicaid	RMI 4135
G.4 Types of retirement plans	RMI 4135
G.5 Qualified plan rules and options	RMI 4135
G.6 Other tax-advantaged retirement plans	RMI 4135, TAX 4001
G.7 Regulatory considerations	RMI 4135, FIN 3144
G.8 Key factors affecting plan selection for businesses	RMI 4135, FIN 4128
G.9 Distribution rules and taxation	RMI 4135, TAX 4001
G.10 Retirement income and distribution strategies	RMI 4135, FIN 4128
G.11 Business succession planning	RMI 4135, FIN 4128
H. Estate Planning	Course Number
H.1 Characteristics and consequences of property titling	FIN 4132
H.2 Strategies to transfer property	FIN 4132
H.3 Estate planning documents	FIN 4132
H.4 Gift and estate tax compliance and tax calculation	FIN 4132
H.5 Sources for estate liquidity	FIN 4132
H.6 Types, features, and taxation of trusts	FIN 4132
H.7 Marital deduction	FIN 4132
H.8 Intra-family and other business transfer techniques	FIN 4132
H.9 Postmortem estate planning techniques	FIN 4132
H.10 Estate planning for non-traditional relationships	FIN 4132
Investment Primer	Course Number
Interest Rate Risk	FIN 3144
Risk and Term Structure	FIN 3144
The Role of Financial Institutions	FIN 3144
Money Markets and Bond Market	FIN 3144
Stock Markets and Mutual Fund Industry	FIN 3144

Appendix G: CVs

LAURA H. MATTIA, PH.D., CFP® CDFA®

Raymond James Personal Financial Planning Director

EDUCATION

<i>Doctor of Philosophy in Personal Financial Planning</i> Texas Tech University (Supporting field: Economics)	2016 Lubbock, TX
<i>Certification in Financial Planning</i> Fairleigh Dickenson University	2002 Madison, NJ
<i>Master of Business Administration, Accounting Concentration</i> Montclair State University	1990 Montclair, NJ
<i>Bachelor of Science in Psychology</i> Montclair State University	1982 Montclair, NJ

TEACHING*Muma College of Business, University of South Florida*

Instructor: Fundamentals Personal Financial Planning and CFP® Capstone

Texas Tech University

Visiting Professor: MS Hybrid CFP® Capstone Class

Visiting Professor: Women Advocacy Circles (Soft skills and career development skills)

Rutgers University

Corporate Finance (large classrooms) and Capstone Class for CFP®

Fairleigh Dickenson University

CFP® Certificate course (Estate Planning and Investment Planning)

William Paterson University

CFP® Certificate course (Investments)

Chinese Bankers and Chinese Students - half day classes (Investments) – multiple classes

Centenary College

Undergraduate – Finance

MBA – Cost Accounting

Corporate Programs (Hired Speaker)

McKinsey, Liberty Science Center, M&M/Mars, Quest Diagnostics – Female Financial Empowerment

Financial Literacy Organizer for NAPFA and the Financial Planning Association (NAPFA) Financial

Literacy Symposiums; Harlem, Jersey City and local universities

RESEARCH

Theme: Women and Money (Female Consumers and Advisors) Working Papers

“Financial Confidence Post-Widowhood: The Role of Empowerment (with J. Grabel, et. al.)

“Female Financial Advisor Job Satisfaction (with Inga Chira)

“Marriage and the Financial Knowledge Gap” (with Michael Finke, Sandra Huston)

“Female Financial Confidence, Knowledge, and Anxiety” (with Sandra Huston)

“Female Satisfaction and Loyalty with Their Financial Advisor” (with Sandra Huston)

NON-ACADEMIC WRITING, SEMINARS, MEDIA

Book

Author: "Gender on Wall Street: Uncovering Opportunities for Women in Financial Services" published June 2018 by Palgrave Macmillan.

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Speaking

“Developing Courage and Confidence”, CFP Board Conference, February 2019
 “Female Financial Empowerment Revolution”, TEDx St. Michaels, January 2019
 “Women Empowerment Series”, Women’s Resource Center (Sarasota)
 “What Women Want” Financial Planning Association, Sarasota
 “Why Accountants Should Consider a CFP®” FICPA, Tampa
 “Communicating with Women and Money” Financial Planning Association, Tampa
 “Women in Financial Planning” Private Wealth Management Summit
 “Financially Empowering Workshops – William Paterson University, Montclair State University,
 Women’s Resource Center & USF Sarasota

Articles and Columns

Article: Do you have a retirement plan? NAPFA Advisor, January 2019
 Article: The final key to gender equality is mastery of money, Market Watch, June 2018
 Article: Looking for Professional Status in All the Wrong Places, FP Journal, June, 2017
 Columnist: ABCNEWS.COM Business Columnist: Financially Empowering Women

TV, Radio, Podcast

Television Guest: Amazing Suncoast Women, Channel 7, June 2018
 Podcast Host: “Women’s Money Empowerment Network”
 TV Host on ‘New Directions’ National Organization of Women (NOW)
 Radio Guest: Numerous appearances

MEMBERSHIPS

Financial Planning Association (FPA) –Board Member and Host of Women and Finance Circle
 National Association of Personal Financial Planning (NAPFA) – National and Regional
 National Organization of Women (NOW)
 Safe Place and Rape Crisis Center (SPARCC) Sarasota Florida – Advocate and member
 Montclair State University Planned Giving Board Member

ACADEMIC CONFERENCE PRESENTER

Academy of Financial Services Conference 2018 in Chicago, Perceptions of Career Preparedness among
 Financial Planning and Finance Students
 CFP Board Research Colloquium 2017 in Washington DC., “Marriage and the Financial Knowledge Gap”
 Laura Mattia, Michael Finke and Sandra Huston.
 American Council on Consumer Interests 2016 in Arlington Virginia, presented, “Marriage and the
 Financial Knowledge Gap” Laura Mattia, Michael Finke and Sandra Huston.
 Financial Therapy Association 2013 at Texas Tech University in Lubbock, Texas, presented, “Gender and
 Financial Advisor Client Satisfaction” Laura Mattia, and Sandra Huston.

AWARDS

Suncoast Amazing Woman, Channel 7 Sarasota, 2018
 Helen DeVitt Jones Part-time Graduate Fellowship 2013-2014 and 2015-2016
 Top Woman of Influence by Sarasota Biz - 2015
 Betty Spawm Lowder Endowed Scholarship 2012-2013
 Best 50 Women in Business by NJBIZ – 2012
 Women’s Choice Award® for Financial Advisors 2014-2016

PROFESSIONAL WORK EXPERIENCE

Fee-Only Financial Planner/Wealth Management Owner	2002 – Present
CFO, Telcordia Technologies, Redbank, NJ	1999 – 2001
Global Controller, M&M/MARS, Hackettstown, NJ	1989 – 1999

Designations and Licenses: CFP®, CRPS®, CDFATM, Series 7, Series 66, Life and Health Insurance

Appendix G: CVs

LUKE RICHARDSON, CPA

TEACHING EXPERIENCE

Instructor Lynn Pippenger School of Accountancy, Muma College of Business University of South Florida Tampa, FL	2015-Present
Adjunct Faculty Barney Barnett School of Business and Free Enterprise Florida Southern College Lakeland, FL	2014

CURRENT COURSES

Federal Taxation of Business Entities (TAX 5015 | University of South Florida)
 Concepts of Federal Income Taxation (TAX 4001 | University of South Florida)
 Accounting Internship (ACG 4940 | University of South Florida)

PAST COURSES

Advanced Taxation of Entities (ACC 6100 | *Florida Southern College*)
 Principles of Managerial Accounting (ACG 2071 | *University of South Florida*)
 Principles of Financial Accounting (ACG 2021 | *University of South Florida*)

PUBLICATIONS

John McKinley, Matthew Geiszler, and Luke Richardson, To Deduct or Not Deduct: 'Qualified Performing Artists', 161 Tax Notes 185 (2018)

John McKinley, Matthew Geiszler, and Luke Richardson, New form may simplify tax compliance for seniors, AICPA The Tax Adviser: Tax Insider (August 30, 2018)

EDUCATION

Stetson University College of Law, Gulfport, FL Candidate for Juris Doctor	Expected 2020
University of South Florida, Tampa, FL Master of Accountancy – Tax Concentration Overall GPA: 4.0	2013
University of South Florida, Tampa, FL Bachelor of Science in Accounting Overall GPA: 4.0 Major GPA: 4.0	2011

INVITED PRESENTATIONS

American Medical Student Association (AMSA) Leadership Program <i>Accounting Basics</i>	2018
FICPA University of South Florida Accounting Conference Tax Reform: An Overview of Where We Are Now	2017
The Tampa Bay CPA Group Fall Seminar Revenue Recognition from Contracts: An Analysis (Graduate Thesis)	2011

PROFESSIONAL EXPERIENCE

Business Tax Consultant – Deloitte Tax LLP, Tampa, FL	2013–2015
Tax Associate (seasonal) – Dearolf & Mereness LLP, Tampa, FL	2013

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Tax Intern – Deloitte Tax LLP, Tampa, FL	2012
Audit Intern – Deloitte & Touche LLP, Tampa, FL	2011
PROFESSIONAL CERTIFICATIONS	
Certified Public Accountant (Florida)	2014–Present
IRS Enrolled Agent	2014–Present
MEDIA APPEARANCES AND QUOTATIONS	
FOX 13 WTVT, ABC Action News WFTS, NBC News Channel 8 WFLA	Television
WalletHub.com, USF News Channel	Website
MEMBERSHIPS	
American Accounting Association (AAA)	2015–Present
American Taxation Association (ATA)	2015–Present
Florida Institute of Certified Public Accountants (FICPA)	2015–Present
American Institute of Certified Public Accountants (AICPA)	2013–Present
AWARDS AND HONORS	
Recipient of LPSOA Advisory Council “Outstanding Teaching Award”	2016, 2018
Finalist for LPSOA Advisory Council “Outstanding Teaching Award”	2015, 2017, 2018
SERVICE	
Member, FICPA Global Conference Advisory Task Force	2018–Present
Member, FICPA Federal Taxation Committee	2016, 2018–Present
Member, FICPA USF Accounting Conference Committee	2016–Present
Member, USF LPSOA Scholarship Committee	2015–Present
Faculty Liaison, IRS VITA Program	2015–Present
Contributor, AAA ATA Tax Question Bank Committee	2018
Treasurer, Board of Directors, Hope Street of Tampa, Inc.	2015–2017
Faculty Advisor, Honors College Thesis (various)	2015, 2017
OTHER ACTIVITY	
Contributor, FICPA Legislator’s Tax Guide	
Reviewer for McGraw-Hill's Taxation of Individuals and Business Entities by Spilker, Ayers, et al.	
Member of reviewer panel for the Pearson Federal Taxation series by Rupert Pope, and Anderson	

Appendix G: CVs

PROFESSOR GARY A.H. LAURSEN, J.D., LL.M. (TAXATION)C.P.A. (FLORIDA)

EDUCATION

University of Miami Graduate School of Law - Master of Laws in Taxation (LL.M.), 1972.
University of Miami School of Law - J.D., 1971.
Florida State University - B.S. in Business Administration (Major in Accounting), 1965.
St. Petersburg Jr. College - A.A. (Liberal Arts), 1963.

PRIMARY TEACHING AREAS

Professor Laursen is credentialed as a Full member of the Graduate Faculty of the University of South Florida (USF). He has been teaching full time at USF since 1980. His teaching responsibilities in the USF graduate and undergraduate programs include or have included the following courses:

Taxation

Advanced Corporate Taxation Advanced Partnership Taxation Contemporary Issues in Taxation Estate and Gift Taxation
Estate Planning
Federal Income Taxation of Individuals & Property Transactions
Taxation of Corporations, Partnerships, and S Corporations Taxation for Managers (Executive MBA) Taxation for Managers (Physicians Executive MBA) Taxation for Managers (Regular MBA Program) Tax Research, Planning and Procedure

Law

Business Law
Business Law for Managers (Executive MBA) Law and the Accountant Social, Legal, and Political Environment of Business

Accounting

Accounting Systems Accounting
Principles

Finance

Estate Planning

EMPLOYME EXPERIENCE

University of South Florida, Associate Professor of Accounting and Law, Tampa, Florida, 1980 - Present
Gary A. H. Laursen, Estate Planning and Taxation Attorney at Law, Dunedin, Florida, 1973 – Present
Graham, Carroll, Hodge & Swan, Attorneys, Estate Planning and Taxation Attorney at Law, Ft. Lauderdale, Florida, 1972 - 1973
Price Waterhouse, Certified Public Accountants, Miami, Florida, Audit and Taxation Departments, 1965 - 1970

PROFESSIONAL HONORS AND MEMBERSHIPS

Florida State Board of Accountancy, Continuing Professional Education Committee Member. Appointed 2003 for 3-year term, with additional 3-year terms granted through 2018. Term continued for 2019. This committee handles all requests for continuing professional education credits, and handles all preliminary approvals of all Ethics courses for Florida. All findings are subject to the approval of the Board of Accountancy. Currently a full-time university professor on the committee (one is required by the Florida Statutes).

Outstanding Accounting Teacher Award, School of Accountancy, presented by Beta Alpha Psi, 2005.
Outstanding Undergraduate Teaching Award for 1998-1999.
Florida Teaching Incentive Award for 1994-1995.
Executive M.B.A. Class of 1995 TEACHING EXCELLENCE AWARD.

Appendix G: CVs

Served as the Chairperson of The Florida Institute of Certified Public Accountants Federal Taxation Committee for 1998-99, and this committee received an award in 1999 as an Outstanding FICPA Committee. Presently a member of the Federal Taxation Committee of the FICPA.

Presently a member of the FICPA – University of South Florida Annual Accounting Conference Committee (past Chairperson).

A member of the faculty of the USF CPA review program that significantly contributed to the #1 ranking of USF accounting graduates with advanced degrees for the period from 1987 through 2006.

Florida Institute of CPA's, Outstanding Seminar Leader - 1994 (also received this award in 1982, 1984, and 1989).

Beta Gamma Sigma - USF 1986 Faculty Member.

Beta Alpha Psi - FSU 1965 and USF 2006 (USF Faculty Advisor for four years)

PROFESSIONAL MEMBERSHIPS

Florida Bar Board Certified Tax Lawyer from 1983 - 2008 Attorney at Law (Florida) since 1971.

Certified Public Accountant (Florida) since 1967. Florida Institute of CPA's (FICPA).

Florida Bar Association.

Pinellas County Estate Planning Council (President 1999). Tampa Bay Estate Planning Council (President 1990-1991).

LEI WEDGE, PH.D.

WORK EXPERIENCE

Assistant Professor – University of South Florida, 2006-2012 Associate Professor – University of South Florida, 2012-now

AREAS OF INTEREST

Research – Corporate Governance, Investments, Corporate Finance Teaching – Corporate Finance, Investments

EDUCATION

Georgia Institute of Technology, Finance, Ph.D., 2001 – 2006
University of Kentucky, Finance and International Commerce, M.A., 1999 – 2001
Nanjing University, English and Finance, B.A., 1995 -1999

PUBLISHED PAPERS

Board Structure, Mergers and Shareholder Wealth: A Study of the Mutual Fund Industry (with Ajay Khorana and Peter Tucano) Journal of Financial Economics Vol. 85, No. 2, 2007, 571-598.
Portfolio Manager Ownership and Fund Performance (with Ajay Khorana and Henri Servaes) Journal of Financial Economics Vol. 85, No.1, 2007, 179-204.
Managerial Ownership and the Disposition Effect (with Richard Fu) Journal of Banking and Finance Vol. 35, Issue 9, 2011, 2407-2417
Board Independence and Mutual Fund Manager Turnover (with Richard Fu) Financial Review Vol. 46, Issue 4, 2011, 621-641
How Does Your State Stack Up? Participation Costs in Higher Education Optional Retirement Plans (with Daniel Bradley) Journal of Investment Management Vol 10, Issue 3, 2012
“Profitability of Option-Based Merger Arbitrage” (with Xuewu Wang) IUP Journal of Applied Finance, Vol. 18, No.4, Oct 2012
Finite Horizon Consumption and Portfolio decisions with Stochastic Hyperbolic Discounting (with Ziran Zou and Shou Chen) Journal of Mathematical Economics, May 2014, Volume 52, 70-80.

CONFERENCE PRESENTATION

Ohio State/Federal Reserve Bank of New York/JFE Conference on Conflicts of Interest in Financial Intermediaries, December 2004, Columbus, Ohio
MITSUI Life Symposium, “Institutional Investors: Issues in Asset Management and Governance”, June 2005, Ann Arbor, Michigan
European Financial Management Association meetings, June 2005, Siena, Italy
Western Finance Association meetings, June 2006, Keystone, Colorado
American Finance Association meetings, January 2007, Chicago, Illinois
CRSP Forum, October 2006, Chicago, Illinois
Financial Management Association, October 2010, New York, New York

Working Papers

Market Efficiency and the Value of Previously Distressed Sales (with Jessica Rutherford, Ronald Rutherford, and Elizabeth Strom), forthcoming at Real Estate Economics
“Hyperbolic Discounting and Sub-additivity: A Theoretical Approach” (with Shou Chen, Richard Fu and Ziran Zou)
What’s the Inside Word? Director-Affiliated Stocks in Mutual Funds (with Tim Burch)
The Impact of Portfolio Manager Ownership on the Pricing of Closed-end Funds (with Ajay Khorana and Henri Servaes)
Management Turnover in Anticipation of SEC Enforcement Actions for Accounting Fraud (with Narayanan Jayaraman and Charles Mulford)

Work in Progress

Managerial Ownership and Return Gap (with Richard Fu)

Consumption and Portfolio Rules with Uncertain Life Time (with Richard Fu and Ziran Zou)
Hyperbolic Discounting and Sub-additivity: A Theoretical Approach (with Richard Fu, Ziran Zou, and Shou Chen)

Advertising in the US Mutual Fund Industry (with Tim Burch)

Foreclosed Properties at Court Auction, Bank Ask Price, and Buyer Premium (with Ronald Rutherford)

OTHER PROFESSIONAL EXPERIENCE

Chartered Financial Analyst, charter awarded August 2006

HONORS AND AWARDS

College of Business Research Achievement Award, USF, 2007

Graduate Student Travel Award, Georgia Institute of Technology, 2004

Atlanta Society of Financial Analysts (ASFA) Scholarship, 2002

Graduate Student Fellowship, University of Kentucky, 2000-2001

Academic Scholarships, Nanjing University, 1995-1999

TEACHING EXPERIENCE

Georgia Institute of Technology – Corporate Finance

University of South Florida – Advanced Corporate Finance, Advanced Financial Management, Investments

PRESS APPEARANCES

Wall Street Journal, July 26, 2006, “Another Way to Assess a Mutual Fund.”

Wall Street Journal, October 14, 2006, “Your Fund Manager’s Secrets.”

Smartmoney.com, October 25, 2006, “Managers with skin in the game.”

Wall Street Journal, November 3, 2006, “Put your money where your mouth is: SEC finds ETF managers often don’t.” SEC, OEA Memorandum, December 29, 2006,

“Literature review on independent mutual fund chairs and directors.” SEC, OEA Memorandum, December 29, 2006, “Power study as related to independent mutual fund chairs

**USF Board of Trustees
Full Board Meeting
December 3, 2019**

Issue: USF Board of Trustees Approval of the Substantive Change Prospectus in alignment with the Board’s oversight responsibilities and SACSCOC requirements

Proposed action: This is an action item to approve a resolution stating alignment between the Board’s Guiding Principles for Consolidation and the SACSCOC Substantive Change Prospectus.

Executive Summary:

The Board’s oversight responsibilities include review of the SACSCOC Substantive Change Prospectus (“Prospectus”) for consistency with the Board’s Guiding Principles, as adopted on April 23, 2018. The implementation of the Prospectus, the underlying structure of the university, and the delivery of academic programs are delegated to the President.

The Prospectus was presented at the combined Strategic Initiatives and CAP committees (“Combined Committees”) on November 20, 2019. Based on the Combined Committees’ feedback and discussion of the Prospectus, the full Board is now asked to consider the following resolution confirming that the Prospectus aligns with the Board guidance on Consolidation:

The University of South Florida Board of Trustees hereby resolves that the Substantive Change Prospectus presented to the Board at its December 3, 2019 meeting is in alignment with the Guiding Principles articulated and adopted by the Board on April 23, 2018.

Strategic Goal(s) Item Support:

Committee Review Date:

Supporting Documentation Online (Please Underline): Yes **No**

USF System or Institution Specific: USF System wide

Prepared by: Savannah Bennett, Office of the President

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November 26, 2019

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1 ABSTRACT (Limit to one page or less).

Describe the proposed change, the location, the projected implementation date and factors affecting the implementation date, and the organizational structure of the current institution. The implementation date in the prospectus shall be the official effective date of change approved by the SACSCOC Board of Trustees. This date should take into consideration the proposed date of approval by the Commission's Board, the date of approval by the institution's governing board, and USDE reporting timelines affecting Title IV funding. For merger/consolidation or acquisition, designate the lead institution.

This prospectus proposes to consolidate, under a single SACSCOC accreditation, the three SACSCOC accredited institutions that currently form the University of South Florida System: the University of South Florida in Tampa, FL, the University of South Florida St. Petersburg in St. Petersburg, FL and the University of South Florida Sarasota-Manatee in Sarasota, FL, which hereinafter will be referred to as USF T, USF SP, and USF S-M, respectively. Pending SACSCOC Board approval of this consolidation prospectus during its meeting on June 8-11, 2020, the newly consolidated university will be a Level VI institution and will be referred to as the University of South Florida (or USF, with no letters after it). The consolidation implementation date will be July 1, 2020, as required by the *Florida Excellence in Higher Education Act of 2018* (i.e. Senate Bill 4) [\[1\]](#). The main (or parent) campus will be in Tampa. The St. Petersburg and Sarasota-Manatee campuses will become branch campuses.

Prior to earning separate SACSCOC accreditations, USF SP and USF S-M were regional campuses operating under the accreditation of USF T. In 2001, the State of Florida required USF SP and USF S-M to seek separate SACSCOC accreditations. Because all three campuses were operating as parts of a single institution, it was decided that many functions and services would remain centralized under a single organizational umbrella (i.e., the USF System) even after USF SP and USF S-M earned separate SACSCOC accreditations in 2006 and 2011, respectively. Thus, the current consolidation will be less complex than it might have been.

Currently, USF T, USF SP, and USF S-M share one governing board, one president, and one set of USF system-wide policies and regulations [\[2\]](#). In addition, many functions and services are coordinated centrally by the USF System, including: advancement; audit and compliance; capital/facilities planning; collective bargaining; diversity, inclusion, and equal opportunity; financial aid; financial management; government relations; human resources; information technology; intercollegiate athletics; international education; legal services; Ombud's services; and research support. Complexities that arise in many SACSCOC mergers or consolidations due to the need to reorganize how Title IV funding is received and distributed will not arise in this case, because the USF System continued operating under one financial aid office when USF SP and USF S-M earned separate SACSCOC accreditations. Title IV funding has always been, and will continue to be, coordinated centrally under one OPEID.

With one governing board, one president (**who is the CEO of USF T and will become the CEO of the consolidated USF**), one set of USF System-wide policies and regulations, and numerous functions and services coordinated centrally, our primary focus has been on defining the post-consolidation roles and responsibilities of the Regional Chancellors (RCs), who currently serve as CEOs of USF SP and USF S-M; the level of autonomy the branch campuses will have after consolidation; and aligning, where appropriate, currently decentralized functions, programs, and services that evolved in different ways after USF SP and USF S-M earned separate SACSCOC accreditations. These primarily relate to academics, student affairs, and student success, including curricula alignment, faculty governance, tenure and promotion, student government, and student fees.

[1] [Florida Excellence in Higher Education Act of 2018 \(page 12\)](#)

[2] [Org Chart - Current - USF System](#)

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2 BACKGROUND INFORMATION

Provide a clear statement of the nature and purpose of the change in the context of the institution's mission and goals. Provide evidence of the legal authority for the change (if authorization is required by the governing board or the state); if no governing board or state authorization is required, explain that in the narrative.

Nature and Purpose of Consolidation in the Context of Institutional Mission & Goals

In June 2016, the Board of Governors (BOG) of Florida's State University System (SUS) designated USF T (the oldest and largest of the three institutions in the USF System and the only Level VI institution) an *Emerging Preeminent State Research University*. The BOG reaffirmed the *Emerging Preeminent* designation in June 2017, thereby setting the stage for USF T's designation as a *Preeminent State Research University* in 2018, at which time USF T became one of just three of the state's 12 public universities earning this distinction. Both the *Emerging Preeminent* and the *Preeminent* designations resulted in increases in recurring state funding to USF T's base budget. As separately accredited institutions, USF SP and USF S-M receive separate appropriations through the legislative process and thus were not able to share with USF T either the funding earned through preeminence or, perhaps more importantly, the accompanying prestige. The inability of their students to graduate from a *Preeminent* university, and their inability to share in new institutional investments through preeminence funding, led members of the Florida State Legislature to question the benefits (or lack thereof) of maintaining separate accreditation for USF SP and USF S-M, the two younger and smaller institutions in the USF System, which are both Level III institutions. Following careful deliberations, the legislature passed the *Florida Excellence in Higher Education Act of 2018* [1], which mandated consolidation of USF T, USF SP, and USF S-M under a single SACSCOC accreditation. This legislation was signed into law by Florida's governor on March 11, 2018.

The intent of the legislation mandating consolidation of SACSCOC accreditations is reinforced in a letter from Representative Sprowls and Senator Brandes to the Chair of the USF Board of Trustees [2], which urges that students at USF SP and USF S-M benefit from USF T's designation as a *Preeminent Research University*. Thus, consolidation was not conceived - and is not perceived - as a way to reduce costs, cut budgets, close a campus, fire campus leaders, or execute any actions that SACSCOC may sometimes question when reviewing proposals to merge or consolidate. To the contrary, the legislative intent is to expand access and opportunities for students on the USF SP and USF S-M campuses by increasing the resources that flow to those campuses while, as subsequent legislation passed in 2019 [3] makes clear, providing those campus leaders the requisite level of autonomy expected of branch campuses.

Following passage of the *Florida Excellence in Higher Education Act of 2018* [1], the USF Board of Trustees, which is the governing board for all three separately accredited institutions in the USF System, established a Consolidation, Accreditation, and Preeminence (CAP) Committee (CAPC) [4] to develop principles to guide consolidation planning and to create an implementation plan and timeline as mandated by the legislation. On April 23, 2018, the CAP Committee approved seven *Guiding Principles for USF Consolidation* [5], informed by language in the legislation, by guidance provided in the letter from Representative Sprowls and Senator Brandes, and by the Board's vision for a consolidated USF. The *Guiding Principles* provided a framework for the creation of a new mission statement and set of goals for the consolidated USF, which were adopted by the USF Board of Trustees on **December 3, 2019**.

New Mission

Led by outstanding faculty and professional staff, the University of South Florida conducts innovative scholarship, creative activity, and basic and translational research, and delivers a world-class educational experience promoting the success of our talented and diverse undergraduate, graduate, and professional students. As a public metropolitan research

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university, USF, in partnership with our communities, serves the people of Florida, the nation, and the world by fostering intellectual inquiry and outcomes that positively shape the future - regionally, nationally, and globally.

New Goals

1. To promote the lifelong success of well-educated, highly skilled, and adaptable **alumnae/alumni** who lead enriched lives, are engaged citizens, and thrive in a dynamic global market.
2. To conduct high-impact research and innovation to advance frontiers of knowledge, solve global problems, and improve lives.
3. To be a major social and economic engine creating robust global, national, and regional partnerships to build a prosperous and sustainable future for our regional communities and the State of Florida.
4. To provide a safe, inclusive and vibrant community for learning, discovery, creative activities, and transformative experiences enabled through adaptive design of physical, social, and digital environments.
5. To practice continuous visionary planning and sound management throughout USF to ensure a strong and sustainable financial base, and to adapt proactively to emerging opportunities in a dynamic environment.

USF's mission and goals will be further considered during an extended and broad-based strategic renewal process to be launched in early 2020.

The consolidation of USF T, USF SP, and USF S-M is not expected to materially increase or decrease student enrollments, the number of faculty or staff, or the inventory of facilities and physical assets on any campus. Nor is it expected to reduce the types and delivery locations of existing degree programs or the quality of support services currently provided to students. To the contrary, there is an expectation that student support services will be enhanced on the branch campuses along with an expansion of graduate education and research opportunities (the branch campuses are currently regional Master's institutions), as additional resources become available for programmatic expansion. In the near term, no cost savings or increases are expected and the net assets of all three institutions will be combined. All current students will be "held harmless" from any consolidation-related changes made and will likely benefit from those changes focused on raising the student success rates on the regional campuses to the levels that currently exist at USF T. While the job descriptions of some employees will change, employees are not expected to be laid off or terminated due to consolidation.

Legal Authority for the Consolidation

The *Florida Excellence in Higher Education Act of 2018* [\[1\]](#), signed into law on March 11, 2018, created two new sections, Section 335 and Section 341, in Chapter 1004 of the Florida Statutes. Section 335 [\[6\]](#) details the process, timeline, and requirements for the accreditation consolidation of the three separately accredited USF System institutions. An amendment, enacted in 2019, updated Section 335 to specify that the two smaller and younger institutions in the USF System will become branch campuses, as SACSCOC defines "branch campus" [\[3\]](#).

Chapter 1004, Section 341 of the Florida Statutes [\[7\]](#), also created by the *Florida Excellence in Higher Education Act of 2018*, specifies that USF SP and USF S-M will each have a campus board and a Regional Chancellor; defines the membership and powers and duties of the campus boards and obligations imposed on the Board of Trustees of the consolidated USF; and specifies that the faculty and students at each campus shall be represented in the academic and student governance structures of the consolidated University of South Florida as determined by the Board of Trustees. Section 341 was not amended in 2019.

The consolidation of accreditations being proposed is required by Chapter 1004, Section 335 of

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the Florida Statutes [8], which provides that USF's Board of Trustees will terminate the separate accreditations of USF S-M and USF SP and operate all three USF System institutions under a single SACSCOC accreditation. The statutory direction to the Board of Trustees to carry out consolidation is consistent with the duties and powers generally conferred on University Boards of Trustees in Florida by Article IX, Section 7 of the Florida Constitution [9], which provides that each Board of Trustees will administer each state university under the overall governance structure of the Florida Board of Governors (BOG). The necessary powers to carry out the realignment of programs, resources, facilities and personnel inherent in consolidation are fully contained in BOG Regulation 1.001 [10].

As discussed in more detail in Section 4 of this prospectus, the statute does not change the overall governance structure of USF; that is, the Board of Trustees is the governing board for the separately-accredited institutions and will remain the governing board for the consolidated institution, which is operated by a single university president who is at all times accountable to the Board of Trustees. For example, USF S-M and USF SP each have statutorily created campus boards, but those campus boards are and will remain purely advisory and will not have a direct conduit to the governing Board of Trustees.

As amended in 2019, Chapter 1004, Section 335 [3] requires that the USF S-M and USF SP campuses be designated branch campuses, which the legislation defines as SACSCOC does; however, the single accreditation requirement remains in place [8]. In effect, this means that USF's governance structure will recognize USF SP and USF S-M as branch campuses with sufficient autonomy to align with a branch campus designation, but not to a level that would prompt or require either campus to seek or obtain separate accreditation, which would be contrary to the plain language and purposes of Chapter 1004, Section 335 of the Florida Statutes.

- [1] [Florida Excellence in Higher Education Act of 2018 \(pages 10-14\)](#)
- [2] [Letter from Legislators to BOT Chair](#)
- [3] [Florida Statute 1004.335 with Branch Campus highlights](#)
- [4] [BOT Discussion about CAP Committee](#)
- [5] [Guiding Principles for USF Consolidation](#)
- [6] [Florida Statute 1004.335 - 2018](#)
- [7] [Florida Statute 1004.341](#)
- [8] [Florida Statute 1004.335 - 2019](#)
- [9] [Florida Constitution, Article IX, Section 7](#)
- [10] [Florida BOG Regulation 1.001](#)

3 ASSESSMENT OF NEED AND PROGRAM PLANNING/APPROVAL

Briefly discuss the rationale for the change, including an assessment of need; evidence of inclusion of the change in the institution's ongoing planning and evaluation processes; and documentation that faculty and other groups were involved in the review and approval of the change, where appropriate.

Rationale for Consolidation

The aforementioned *Florida Excellence in Higher Education Act of 2018* [1] does substantially more than mandate the consolidation of the three separately accredited institutions in the USF System under a single SACSCOC accreditation. The bill includes several provisions designed to elevate the national and international standings of Florida's public universities. Thus, consolidating the separately accredited institutions in the USF System under a single SACSCOC accreditation can be seen as part of a broader effort by the state legislature to raise the stature of Florida's universities by strengthening the existing relationships between the one *Preeminent* university in the USF System and the two smaller, younger, regional Master's

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institutions, and to motivate the consolidated USF to strive for excellence across all campuses.

Assessment of Need

In the State of Florida, most new state funding for public universities is tied to performance metrics (Performance-Based Funding and Preeminence) that focus heavily on student access, affordability, and success, and research productivity [2]. Years of planning and coordination by USF T to boost performance metrics resulted in increased funding and a designation by the State of Florida as a *Preeminent State Research University*. Between 2014 and 2018, USF T boosted its four-year graduation rate for FTICs (first time in college undergraduates) from 44.3% to 60.5%, which put it over the 60% threshold required to be designated *Preeminent*. However, the USF System-wide four-year graduation rate for FTICs in 2018 was only 58.6%, which means the four-year graduation rates for students enrolled at the current regional institutions (i.e., the future branch campuses) will have to be improved significantly for the consolidated USF to maintain its *Preeminent* designation beyond the 2021-22 academic year, given that consolidated data will be used to determine eligibility for *Preeminence* beginning July 1, 2022.

While the four-year graduation rate is based on full-time students only, the six-year graduation rate includes part-time students. As with the four-year rate, the six-year rate is substantially higher at USF T than at the current regional Master's institutions/future branch campuses (73.1% at USF T in 2018 compared to 33.3% at USF SP). Consolidation of student success operations into a unified division with common expectations across all three campuses is expected to boost both six-year and four-year graduation rates and enhance the student experience on all campuses.

The FTIC four-year graduation rate is one of two preeminence metrics that also double as Performance-Based Funding metrics [2]. The other is the freshman-to-sophomore year retention rate/academic progress rate. USF T already meets the required preeminence standard of a 90 percent freshmen-to-sophomore retention rate but, as with graduation rates, the combined performance of the three USF campuses falls short of this threshold. Working together as one institution with common admission standards and unified expectations for student success, the freshman-to-sophomore retention rate is also expected to improve on all campuses.

While student success is critical, student success earned by limiting access is not acceptable. Among all public universities, USF T is ranked by the *Education Trust* as #1 in the nation for Latino student success [3] and #6 nationally (and #1 in Florida) for Black student success [4]. USF T is also ranked by the *Third Way* as #9 in America (and #1 in Florida) among all public universities for success by Pell recipients [5], who comprise 40% of USF T's undergraduate student body. The consolidated USF will remain committed to increasing success rates for all students.

While granting access to and improving the likelihood of success for students from a wide variety of backgrounds is a high priority for the consolidated USF, another priority that consolidation will address is that of expanded access to curricular offerings on the future branch campuses. Curricular offerings are not likely to increase during the first year of consolidation, but efforts are underway to secure requisite funding to increase the array of degrees and majors in future years. Targets for increasing curricular offerings on the branch campuses, along with cost estimates, have been identified [6], as have opportunities to expand research, scholarship, and creative activity that will meet local needs and, through the establishment of interdisciplinary centers of academic and research excellence, contribute to USF's research stature. Due to the high cost of expanding programs, especially doctoral programs, additional planning will likely be required to establish priorities.

Stakeholder Involvement in Planning for Consolidation and Approval of Plans

Representatives of the three separately-accredited institutions have engaged in a coordinated,

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collaborative planning process to prepare for consolidation. This process involved stakeholders at all levels, including the Board of Trustees; faculty, students, and staff from each campus; along with community members.

Within days of the passage of the law mandating consolidation, USF's Board of Trustees created its own ad hoc Consolidation, Accreditation and Preeminence (CAP) Committee, comprised of four Trustees, which adopted a set of *Guiding Principles for USF Consolidation* [7] at its first meeting. The CAP Committee met regularly during the first year of consolidation planning to oversee the development of the legislatively mandated *Consolidation Implementation Plan and Timeline*, which was approved by the USF Board of Trustees and submitted to the State University System in March of 2019.

At the direction of the BOT CAP Committee, the President of the USF System created an internal Consolidation Implementation Committee (CIC) to advise USF leadership on the steps it must take to successfully consolidate. The CIC held its first meeting on June 11, 2018. The 86-member CIC included faculty, staff, and students from each of the consolidating institutions and consisted of six sub-committees [8]. Most of the CIC's work was conducted in meetings of these six sub-committees, but the co-chairs of each sub-committee met bi-weekly to coordinate and track progress. The CIC's report was submitted to USF leadership in December, 2018 [9].

While the CIC included a sub-committee focused on General Education and Curriculum Alignment, collegial collaboration about a General Education program for the consolidated USF began before this CIC sub-committee first met. In 2017, the faculty at USF T created a framework for an Enhanced General Education curriculum. After the bill mandating consolidation was signed into law in March of 2018, USF T faculty shared their framework with their colleagues at USF SP and USF S-M. Faculty at USF SP approved the Enhanced General Education curriculum for the consolidated USF in Fall 2018 [10], before the CIC issued its final report. Faculty at USF S-M approved it for the consolidated USF in Spring 2019 [11]. The assessment plan for the Enhanced General Education program was created collaboratively by faculty from each of the three campuses. An interesting feature of this collaboration is that the General Education curriculum and assessment plan were enriched by the collaboration. USF S-M's QEP focuses on critical thinking. The Enhanced General Education framework developed at USF T embeds critical thinking throughout the curriculum. By collaborating, faculty were able to use USF S-M's QEP as the vehicle for embedding critical thinking into the Enhanced General Education curriculum. Thus, the future plan for USF S-M's QEP is to implement its core components on all three campuses as part of the consolidated USF's Enhanced General Education curriculum. USF SP submitted its QEP Impact Report in 2011, but USF T, like USF S-M, has an active QEP. The QEP for USF T focuses on Global Citizenship. The curricular and programmatic enhancements resulting from this QEP will be incorporated into the curricula and programming implemented by the consolidated USF. Thus, the future plan for USF T's QEP is to implement its transformational benefits across the three campuses of the consolidated USF.

Following a recommendation by the CIC, the Provost and Executive Vice President of the USF System created 10 Teams comprised of leaders of functional areas, 12 Clusters of faculty with expertise in distinct disciplinary areas, and an Executive Committee to coordinate and integrate the work of the Teams and Clusters [12]. The inaugural meeting of the Team and Cluster leads, charging them with further development of the CIC's recommendations, occurred on January 8, 2019. The final Consolidation Teams and Clusters' report was submitted on February 12, 2019. Input from the CIC report, the Consolidation Teams and Clusters' report, and the report of the legislatively mandated 13-member Consolidation Planning Study and Implementation Task Force, which was comprised of community leaders from across the region who were appointed pursuant to law, were integrated into the *Consolidation Implementation Plan and Timeline* that was submitted to the Board of Governors (BOG) of the State University System (SUS) in March of 2019. The *Consolidation Implementation Plan and Timeline* [13] provided the framework that

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enabled USF System leadership to begin implementing steps to facilitate consolidation.

Implementation of the *Plan and Timeline* began in early March of 2019 when the USF System President created an Accreditation Steering Committee and charged it with coordinating the development of consolidation documents required by SACSCOC, providing regular updates to the BOT, and facilitating a successful SACSCOC site visit following consolidation. The Accreditation Steering Committee is chaired by the USF System's Provost and includes the Regional Chancellors of USF SP and USF S-M, along with the co-chairs of the CIC. The Accreditation Steering Committee first met on April 8, 2019 and meets monthly. The President also asked the Deans of the colleges at USF T, USF SP, and USF S-M to jointly charge ad hoc Disciplinary Committees with aligning and integrating curricular offerings that exist on more than one campus to ensure that the faculty developed and approved curriculum for the consolidated USF by July 1, 2020 [14]. The ad hoc Disciplinary Committees completed their major curricular alignment activities in early May of 2019 in preparation for Faculty Senate approval of the proposed curricular changes. Because the three consolidating institutions are all part of the USF System, which has a System Faculty Council (SFC) that includes leadership from the Faculty Senates on each of the separately accredited campuses, the SFC (led by the faculty representative on the USF Board of Trustees) stepped forward and created an Intercampus Consolidation Committee for Curricular Changes (I4C) comprised of the chairs of the undergraduate and graduate councils on each campus (or their equivalents), which was authorized to consider and approve changes needed to align and integrate curricula. Changes to all 38 degree programs and all majors were approved by the I4C by September of 2019. Changes to certificate programs, concentrations within majors, and minors will be approved by the time the 2020-21 undergraduate and graduate catalogues are published for the consolidated USF in the spring of 2020.

Although faculty have authority over the curriculum, USF System Policy 10-055 [15] also provides USF faculty a voice regarding proposals to restructure academic units to facilitate consolidation. This policy requires the administration to provide faculty 90 days to review and comment on any proposed changes before those changes are implemented. Proposed changes were sent to the Chair of the System Faculty Council, for distribution to the Faculty Senates on each campus, in early August of 2019 [16]. On October 17, 2019, the SFC recommended that the proposed Academic and Student Success Reorganization proceed and unanimously approved a motion indicating that faculty participation in the Consolidation Implementation Committee, the Consolidation Teams and Clusters, and the curriculum alignment process met the requirements of USF System Policy 10-055.

Evidence of inclusion of consolidation in ongoing planning and evaluation processes is further detailed in Section 10 of this Prospectus.

- [1] [Florida Excellence in Higher Education Act of 2018](#)
- [2] [Performance-Based-Funding-Overview-May-2019](#)
- [3] [Education Trust 2017 - Latino Student Success \(Top Performing\)](#)
- [4] [Education Trust 2017 - Black Student Success \(Top Performing\)](#)
- [5] [Third Way 2018 - Pell Student Success \(Top Performing\)](#)
- [6] [Unified Response to Task Force by -wilcox-tadlock-holbrook-11-06-2018](#)
- [7] [Guiding Principles for USF Consolidation](#)
- [8] [CIC Structure and Membership](#)
- [9] [CIC Final Report 2018.12.19](#)
- [10] [USF SP Faculty Senate Minutes Documenting Approval of Enhanced Gen Ed](#)
- [11] [USF S-M Faculty Senate Minutes Documenting Approval of Enhanced Gen Ed](#)
- [12] [Teams and Clusters Memberships and Charges](#)
- [13] [Consolidation Implementation Plan and Timeline 031319](#)
- [14] [Curriculum Alignment Request to Deans](#)

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[15] [USF System Policy 10-055](#)[16] [Transmittal Letter to SFC for Review of Proposed Structure](#)

4 DESCRIPTION OF THE CHANGE

Provide a description of the proposed change, including any change in degree-granting authority. Provide an organizational chart for the proposed change. Describe the current governing board and the new governing board, listing the rosters for both. The rosters should provide titles, board members' occupations and affiliations, and current term. Describe the current and proposed authority of the Board and address committees of the Board. Explain the role of current owners/board members in the proposed change. Provide the current and proposed conflict of interest and board dismissal statements. Describe any differences in administrative oversight of programs or services. Describe any new foundations that will be established as the result of the change and the foundation's role in governance, if any. Describe how the change affects current foundations.

The consolidation of USF SP and USF S-M (both Level III institutions authorized to award Associate's, Bachelor's, and Master's degrees) with USF T (a Level VI institution authorized to award those degrees plus Specialist and Doctoral degrees) will have no impact on degree granting authority, since the resulting institution will award all degrees currently awarded by the three institutions. Following consolidation, however, those degrees will be awarded by one University of South Florida rather than by three separate institutions. Curricular changes made to facilitate consolidation are documented on the Institutional Summary Form and faculty involvement in making and approving those curricular changes is described in Section 3 above.

The Board of Trustees (BOT)

The governance structure will not change as a result of consolidation, nor will the governing board's membership or responsibilities. Pursuant to constitutional requirements in Florida Statute 1001.71 [1], the BOT is comprised of 13 trustees. Florida's Governor appoints six and the Board of Governors (BOG) of the State University System (SUS) appoints five. The Florida Senate confirms these 11 trustee appointments. A faculty representative and a student representative, both voting members, round out the BOT's membership roster shown here [2].

The BOT is currently the single governing board for all three separately accredited institutions in the USF System and will continue as the single governing board for the consolidated USF. Presently, USF SP and USF S-M have campus advisory boards which, following consolidation, will maintain their purely advisory role. While the campus boards currently advise the BOT Chair, following consolidation they will advise the President and CEO of the consolidated USF, who currently serves as the President of the USF System and CEO of USF T. The BOT's Operating Procedures will be amended to reflect a single accreditation with meaningful, but strictly advisory campus boards, which have a clear reporting structure to the BOT exclusively through the USF President [3]. The BOT confirmed this structure on June 6, 2019 [4].

The authority of the BOT for the consolidated USF will remain the same as it is now for the USF System and its member institutions. The BOT is responsible for making policy decisions appropriate to the university mission [5]. The BOT selects and evaluates the USF President, who may also be removed by the BOT. The BOT ensures that financial resources support the educational programs consistent with its legislative budget request and determines tuition policy and approves student fees. The BOT also reviews and approves the University's operating budget as required by BOG Regulation 9.007(1) [6]. The BOT also routinely evaluates the institution's mission and routinely engages in self-evaluation.

The BOT currently has five standing committees, plus the ad hoc Consolidation, Accreditation and Preeminence (CAP) Committee. The five standing committees are Academics and Campus

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Environment; Audit and Compliance; Finance; Governance; and Strategic Initiatives [\[7\]](#).

The BOT is actively involved in overseeing the consolidation process. It established its own CAP Committee to provide oversight and strategic guidance for the actions necessary to meet the statutory requirements contained in Chapter 1004, Section 335, Florida Statutes [\[8\]](#). The CAP Committee developed a charter [\[9\]](#) for the legislatively mandated 13-member Task Force to facilitate the orderly operation of the Task Force as it developed its consolidation recommendations. The CAP Committee also published a set of *Guiding Principles for Consolidation* [\[10\]](#) to inform all decision-making about consolidation.

Article VII of The BOT's Operating Procedures contains a *Code of Ethics* stating the fiduciary obligations of trustees and prohibiting conflicts of interest [\[11\]](#), which requires Trustees to be free of any contractual, employment, or personal or familial financial interest in the institution. Voting conflicts must be disclosed under Florida law [\[12\]](#). In addition, the BOT follows a *Code of Conduct for Financial Functions* [\[13\]](#). The current *Code of Ethics* was reviewed and revised in 2016 and is not anticipated to change in substantive ways as a result of consolidation.

The Constitution of the State of Florida, Article IV, Section 7[\[14\]](#), establishes the methods for removal of trustees. Because the BOT does not have authority to dismiss its members, it does not have a BOT-issued policy on dismissal of members. However, the BOT has the duty to notify "the Board of Governors or the Governor, as applicable, in writing whenever a member has three consecutive unexcused absences from regular board meetings in any fiscal year, which may be grounds for removal" [\[15\]](#). No member of the USF BOT has ever been dismissed.

No new foundations will be created as a result of consolidation, nor will consolidation affect any current foundations. Development efforts are currently consolidated under USF System Policy 0-216 [\[16\]](#), which will not change as a result of consolidation.

Differences in Administrative Oversight of Programs or Services

Consolidation will not impact administrative reporting lines at the highest levels of the organization. The Regional Chancellors (RCs), who presently serve as CEOs of the regional institutions that will become branch campuses, will continue to report to the President. A current senior leadership organizational chart for the USF System can be viewed here [\[17\]](#) and a post-consolidation chart for the consolidated USF can be viewed here [\[18\]](#). While consolidation will not impact lines of reporting at the highest administrative levels, the authority delegated to the RCs will change and the reporting structure for the consolidated USF will clearly articulate the collaborative relationships among RCs, the University Provost, Vice Presidents, and College Deans in matters of academic affairs and student success. The RCs will serve, along with University Vice Presidents, on the President's Cabinet.

No new colleges and no new senior institutional leadership positions are planned, although members of the Provost's leadership team, who currently primarily serve USF T [\[19\]](#), will serve all campuses following consolidation [\[18\]](#), becoming members of the USF Academic Leadership Team, which will be expanded to include Regional Vice Chancellors (or Associate Vice Chancellors) for academic affairs and/or student success on the branch campuses. Each branch campus will have a leadership team, led by the RC, which will include their direct reports and those representatives of USF Vice Presidential units and College Deans who will be assigned primarily to fulfill local branch campus responsibilities.

Currently, USF T, USF SP, and USF S-M have their own college structures. Following consolidation, there will be one college for each overarching disciplinary area, led by one college dean. All college deans will be members of a singular Council of Deans, which will be overseen by the Provost of the consolidated USF [\[20\]](#).

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Some USF colleges will have academic programs and faculty on more than one campus. These "multi-campus" colleges will be led by a College Dean who will be responsible for assuring that the programs are unified and successful on all campuses. Academic administrators will have either college-wide responsibilities, reporting to the College Dean, or local campus responsibilities, reporting to the College Dean while maintaining a working relationship with the RC. Some USF colleges will reside on only one campus. If such a "single-campus" college is physically located on a branch campus, the College Dean will report to the Provost and to the RC, acting as a Campus Dean. Campus deans or local department/college leaders report to the College Dean in matters of academic affairs and student success and to the RCs or designee on local branch campus matters.

The consolidated Student Success unit will be led by a Vice President of Student Success and a team of ten Associate Vice Presidents, eight of them responsible for the administration of functional areas. The other two members of the Student Success leadership team will be the Regional Vice Chancellors responsible for Student Affairs and Student Success at the two branch campuses. Together, the Vice President, Associate Vice Presidents, and the Regional Vice Chancellors serve as the Student Success Cabinet, which is empowered to set a consistent direction for multi-campus student success initiatives that are designed to deliver equivalent high-quality student support services across all three campuses. Decisions made by this team will be implemented across the three campuses, with the Regional Vice Chancellors serving as the accountable Student Success/Student Affairs officers for their campuses.

A few key functional areas, such as Admissions [21] and Student Success [22], have already begun operating within a consolidated structure reporting to university leadership and ultimately to the USF System President. Student services, including advising, student advocacy, mental health counseling, financial aid, and career services will continue to be delivered locally to ensure that all students have expedient and equitable access to the support they need. The RCs or their designees, in partnership with the Provost, the Vice President for Student Success, and the College Deans, will continue to be responsible and accountable for assuring the delivery of equitable support services for students, faculty, and other academic/student success personnel on the branch campuses. A detailed explanation of administrative oversight of programs and services is provided in a communique that was sent by the President and the Regional Chancellors to members of the USF community on October 17, 2019 [23]. That communique includes a link to a more detailed plan [24], which describes the branch campus annual budget planning and approval process, as well as the process of hiring, recruiting, assigning, and evaluating the performance of faculty and academic/student success personnel.

Student and Faculty Governance Body

Student Governments at USF T, USF SP, and USF S-M developed and overwhelmingly approved a unified Constitution [25] for the consolidated USF, which was ratified by the student bodies on each campus on November 19-20, 2019 and approved by the President by **December 3, 2019**. Based on a federalist model, governing bodies on each campus will address local concerns, and a central government will address concerns that apply to students on all campuses [26]. A consolidated set of statutes for student governance in the consolidated USF will be finalized before student government elections occur in the Spring of 2020, during which leaders of the consolidated student body will be selected for the 2020-21 academic year.

The USF System Faculty Council approved a Faculty Senate Constitution [27] and set of Bylaws [28] for the consolidated USF on October 17, 2019. Approval of these documents by the USF T, USF SP, and USF S-M Faculty Senates, and ratification by faculty on each campus, was completed by **December 2, 2019**. The President approved these documents by **December 3, 2019**.

[1] [Florida Statute 1001.71\(1\) - University Boards of Trustees - Membership](#)

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- [2] [USF Board of Trustees - Names, Titles, Occupations, Affiliations and Terms - 2020](#)
- [3] [Org Chart - Future - Governance](#)
- [4] [BOT Roundtable on Continuity of Leadership](#)
- [5] [USF BOT Operating Procedures Article I D \(page 3\)](#)
- [6] [Florida Board of Governors Regulation 9.007\(1\) - State Univesity Operating Budgets](#)
- [7] [USF System - Board of Trustees - Committees](#)
- [8] [Florida Statute 1004.335 - Accreditation Consolidation of USF Branch Campuses](#)
- [9] [Task Force Charter](#)
- [10] [Guiding Principles for USF Consolidation](#)
- [11] [USF BOT Operating Procedures Article VII - Code of Ethics \(page 11\)](#)
- [12] [Florida Statute 112.3143\(2\)\(a\) - Voting Conflicts](#)
- [13] [USF BOT Financial Code of Conduct Alternative](#)
- [14] [Florida Constitution, Article IV, Section 7 - Suspensions - Filling Office](#)
- [15] [Florida Board of Governors Regulation 1.001\(2\)\(c\) - Reporting Absences](#)
- [16] [USF Policy 0-216](#)
- [17] [Org Chart - Current - Senior Leadership - USF System](#)
- [18] [Org Chart - Future - Senior Leadership](#)
- [19] [Org Chart - Current - USF Tampa](#)
- [20] [Org Chart - Future - Council of Deans](#)
- [21] [Unification of Admissions](#)
- [22] [Unification of Student Success](#)
- [23] [One USF - Cover Memo - October 17, 2019](#)
- [24] [One USF - Plan - October 14, 2019](#)
- [25] [Ratified Student Government Constitution](#)
- [26] [Org Chart - Student Government for One USF](#)
- [27] [Faculty Senate Constitution](#)
- [28] [Faculty Senate Bylaws](#)

5 FACULTY

Provide a narrative with supporting evidence that the number of full-time faculty members is adequate to support programs. Describe the impact of the proposed change on faculty and faculty workload. If the institution is merging with a non-SACSCOC institution, provide a complete roster (using the Faculty Roster form at www.sacscoc.org under "Substantive Changes") of the non-SACSCOC faculty to be added to the institution's faculty, including a description of those faculty members' academic qualifications and other experiences relevant to the courses to be taught. NOTE: Depending on the nature of the substantive change, it may be appropriate to provide additional faculty details.

The three institutions engaged in this consolidation are each presently separately accredited by SACSCOC. Therefore, a faculty qualifications roster is not required.

Adequacy of Full-Time Faculty to Support Programs of Study

The consolidation is not expected to reduce the number of faculty or the percentage of faculty who are full-time. Currently employed faculty are expected to remain with the consolidated institution to ensure that USF's educational, research, and service missions can be met, and to ensure continued curriculum and program quality, integrity, and review. SACSCOC recently determined that each of the institutions involved in this consolidation had an adequate number of full-time faculty members to support degree programs through USF SP's fifth-year interim review in 2017, USF S-M's reaffirmation in 2016, and USF T's reaffirmation in 2015. More recently, in fall 2018, the consolidating institutions had a combined IPEDS student-to-faculty ratio of 21 to 1, and with 2,023 full-time instructional faculty and an additional 452 other full-time faculty at USF T, USF SP, and USF S-M in 2018 serving 50,755 students, 74% of whom were undergraduates and 71% of whom were full-time, USF had a sufficient number of full-time faculty to support its programs. Since consolidation will not reduce the total number of faculty or

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the percentage of faculty who are full-time, the consolidated USF will have an adequate number of full-time faculty to support its programs. The table below summarizes the percentage of credit hours taught by full-time faculty at each separately accredited institution during the 2018-19 academic year.

Student Credit Hours (SCH) Taught by Full and Part Time Faculty - Fall 2018 & Spring 2019

Campus	Undergraduate (Excluding Gen Ed)			Graduate			Classroom-based			Online		
	SCH #	Percent taught by:		SCH #	Percent taught by:		SCH #	Percent taught by:		SCH #	Percent taught by:	
	Total	Full- time	Part- time	Total	Full- time	Part- time	Total	Full- time	Part- time	Total	Full- time	Part- time
USF T	751,831	73	27	155,807	85	15	666,669	77	23	240,969	69	31
USF SP	93,374	66	34	6,840	78	22	67,546	71	29	32,668	57	43
USF S-M	46,743	63	37	2,227	85	15	19,699	77	23	29,271	55	45
Total	891,948	71	29	164,874	85	15	753,914	76	24	302,908	66	34

While changes are being made to some curricular offerings to align programs of study that are presently offered by more than one institution, and these curricular integrations will result in some changes to academic organizational structures, and hence faculty departmental affiliations, the curricular integrations and the academic organizational changes are generally aligned to ensure that no academic programs will lose full-time faculty. Following consolidation, USF will continue to offer essentially the same portfolio of degree and certificate programs that the three separately accredited institutions currently offer, and the faculty currently supporting specific programs of study will continue to support those programs following consolidation. Only a small number of previously approved new academic programs, for which faculty are in place or are being recruited, will begin at any of the consolidated USF campuses in academic year 2020-21 (See table on the Institutional Summary Form). Planning for these new programs began prior to, and independent of, our planning for consolidation and these new programs would be created even if we were not consolidating. Further, we do not expect there to be an expansion of any existing degree programs on one USF campus to other USF campuses in academic year 2020-21 (our first year operating as a consolidated institution), nor will there be any deactivations of currently offered programs of study. Given the relatively small number of changes that are being made to curricula and academic organizational structures, the detailed breakout by degree level, major, and institution based on Fall 2018 data, available here [\[1\]](#) fairly approximates the high percentage of credit hours that will be taught by full-time faculty following consolidation.

Impact of Consolidation on Faculty Workload

USF plans to implement faculty workloads strategically and equitably following consolidation to best meet student needs while providing faculty members on all campuses with equity of assignment and support for research, scholarly, and creative activities. The table below, based on Fall 2018 data, shows that teaching loads for tenured/tenure-track faculty are roughly comparable across the USF System, with the exception of faculty in Health colleges, whose service obligations include patient care. While teaching loads at USF SP and USF S-M will require some reduction to ensure equity of assignment, the biggest impact of consolidation on faculty workload at the branch campuses will involve a reduction in service obligations as the committee and administrative service burden currently being distributed among a small number of faculty is distributed more widely, thereby freeing up more time for scholarly research and creative activities.

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Tenured/Tenure-Track Faculty		Percent of Faculty Workload		
Campus	Headcount	Teaching	Research	Service ³
USF T Health ¹	243	36%	38%	26%
USF T Academic Affairs	866	44%	35%	21%
USF SP ²	110	48%	23%	28%
USF S-M ²	49	48%	23%	29%

¹ Health's service assignment is high because it includes patient care.

² Fewer faculty for administrative/committee duties means higher service loads on smaller campuses.

³ Service category also includes faculty on sabbatical or release time.

As a Preeminent, Carnegie-designated R1 University (Doctoral University: Very High Research Activity), USF T has long set high expectations for scholarly productivity. However, a single set of tenure and promotion guidelines [2], developed by the USF System Faculty Council, adopted by the university, and supported by the United Faculty of Florida representing faculty at USF T, USF SP, and USF S-M on June 27, 2019, will become effective on July 1, 2020. These guidelines set higher scholarly productivity goals for USF SP and USF S-M faculty. Tenured faculty and instructors will retain their current status. Tenure-earning faculty initially hired at USF SP and USF S-M who have three years of tenure-earning credit on July 1, 2019 will be considered for tenure consistent with current local guidelines that are being used prior to consolidation. All other tenure-earning faculty will be evaluated for tenure and promotion using the new guidelines. Reductions in teaching loads combined with reduced service expectations will ensure equity of assignment and make it possible for all faculty to succeed in the consolidated USF. Although many of the faculty at USF SP and USF S-M are already research active, the significance of this change in performance expectations is acknowledged. More specifically, practices for determining faculty assignments for teaching, research, scholarly and creative activity, and service, are being reviewed and a workload policy is being developed. A faculty handbook, and college and department specific tenure guidelines, are also being developed and will be finalized prior to consolidation.

[1] [Student Credit Hours Taught by Full-Time Faculty, by Degree Level, Major, and Campus](#)

[2] [Tenure and Promotion Guidelines for a Consolidated USF](#)

6 LIBRARY AND LEARNING RESOURCES

As appropriate to the change, describe library and learning resources, in general as well as specific to the program, site, or institution, as warranted. Describe the staffing and services in place to support the change. If reliant upon other libraries, describe those collections and their relevance to the proposed change and include a copy of formal agreements in the appendix. Relative to electronic resources, describe how students and faculty will access information, training for faculty and students in the use of online resources, and staffing and services available to students and faculty. If citing electronic databases accessed through consortial or statewide groups, please describe the discipline-specific suites of resources and not just the name of the consortium (such as Viva, Tex-Share, Galileo, Louis, etc.).

The library system for the consolidated USF will be comprised of the main research library and the Shimberg Health Sciences Library at USF T; the Poynter Memorial Library at USF SP; the Cook Library on the New College of Florida campus, which is adjacent to the USF S-M campus; and the Florida Blue Health Knowledge Exchange, which is the library affiliated with USF Health in South Tampa, a SACSCOC-approved off-campus instructional site that is scheduled to open in January of 2020. Current staffing for the libraries can be found here [1]. No library positions will be lost due to consolidation.

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Currently, the main USF T research library is led by the Dean of the USF Libraries, who reports directly to the Provost. The Shimberg Health Sciences Library is led by a Dean, whose portfolio includes the USF Health community, including the Morsani College of Medicine, the Taneja College of Pharmacy, and the Colleges of Nursing and Public Health. The Poynter Memorial Library at USF SP is also led by a Dean. USF S-M has a Library Services unit but does not have its own library; USF S-M students, faculty, and staff use the Jane Bancroft Cook Library on the adjacent New College of Florida campus. New College of Florida, like USF S-M, is a part of the State University System (SUS) of Florida, and per a Library Management Agreement, is considered a shared SUS resource [2]. The USF S-M Library Services unit is led by the Director of Library Services. Following consolidation, the current Dean of the USF T main library will become the Dean of USF Libraries, reporting to the Provost, and will assume responsibility for all library resources and services.

Consolidating USF T, USF SP, and USF S-M under a single SACSCOC accreditation will result in expanded access to library collections, technology, and facilities; seamless online access to library services, tools, and collections; and coordination of policies. The consolidated USF Libraries will maintain and manage the formal relationships established by individual campus libraries prior to consolidation on behalf of all locations and will continue annual reviews of said agreements under the new leadership structure. This arrangement ensures that benefits previously limited to the subscribing library location will now extend to all libraries. A full enumeration of the consolidated USF Libraries' memberships and partnerships, which provide access to information resources not owned by the libraries, is available here [3]. A comprehensive listing of all library resources accessed through consortial or statewide groups is available here [4]. USF T subscribes to the Center for Research Libraries and the Hathi Trust, which provide access to millions of newspapers, journals, books, pamphlets, volumes and serial titles; and this will continue for the consolidated USF Libraries.

Collection development practices over the past two decades focused on acquisitions of e-resources over print, whenever possible, to extend the availability, portability, and currency of materials. USF T, USF SP, and USF S-M each contribute to the cost of the collection. Current online collection holdings available to all include 941 databases, 721,020 e-books and 65,050 e-journals. The Shimberg Health Library's online collections include 269 e-journal subscriptions, 35 specific health science databases, and 3,304 e-books. A small subset of clinical resources is limited to access by Health students and faculty. All other materials are universally accessible.

Coordination of the libraries in the consolidated USF will lie in collaborative management of the shared electronic collections, the means of access to those collections, and a range of needs assessment activities that cover five broad categories: Collections [5], Services [6], Facilities and Equipment [7], Academic Programs [8], and Outreach [9]. These assessments will be informed by the Faculty Senate's Library Council, the Student Advisory Board, and the Dean's Advisory Board. The Library's Faculty Committee will collaborate with the library's administration through a formal shared governance process. Each library will maintain a physical collection and technology resources to support onsite learning and research and facilities appropriate to campus needs [10]. The libraries already work closely with Students with Disabilities Services and Information Technology to assure that computer workstations in open areas are accessible and have software (i.e., Zoomtext, Dragon Naturally Speaking) that aid in accessing and fully utilizing library resources. The licensing process includes robust consideration of ADA compliance prior to acquiring materials.

The USF Libraries' physical collections [11] include print, microform, video, audio, maps, medical images, and multimedia materials. As a member of the Federal Depository Library Program, the USF Libraries receive catalog records for approximately 45 percent of the annual U.S. Government Printing Office publication output, now overwhelmingly supplied in a digital format. Rare and unique primary source materials are held by the Special Collections

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department. Collection foci include Florida Studies, children's and young adult literature, the book arts, Florida environmental history, a local African-American newspaper *The Weekly Challenger*, and the Briggs Collection of Ichthyology and Natural History [12].

The USF Libraries' website currently functions, and will continue to function, as the primary online portal to locate and access collections and information resources. Students and faculty navigate through a system of drop-down menus and links and are assisted by online subject guides and context-sensitive help resources supplied by the USF Libraries and the publishers of the resources, e.g., EBSCO's Discovery Service (FindIt). Online search aids created by Special Collections librarians describe and facilitate access to archival and manuscript collections. Online resources created and hosted by the libraries are accessible globally at no cost. The website also provides links to all affiliated library websites. Distance education students, regardless of location, have the same access to search tools and online resources as on-campus students, and may request no cost shipment of print holdings and desktop delivery of copies of print articles. Specific training and support for the use of online resources is available by appointment, online chat, email, text, and scheduled in-person trainings. A list of services provided at each library and the impact of consolidation on those services is available here [13].

- [1] [Library Staffing Table](#)
- [2] [Cook-Library-Management-Agreement](#)
- [3] [Current Library Memberships and Partnerships](#)
- [4] [Library Resources via Consortial or Statewide Groups](#)
- [5] [Library Needs Assessments - Collections Resources](#)
- [6] [Library Needs Assessments - Services](#)
- [7] [Library Needs Assessments - Facilities and Equipment](#)
- [8] [Library Needs Assessments - Academic Programs](#)
- [9] [Library Needs Assessments - Outreach](#)
- [10] [Library Facilities](#)
- [11] [Library Collections by Format](#)
- [12] [Library Resources by Sub-Library and Subject Area](#)
- [13] [Service Portfolios and Delivery](#)

7 STUDENT SUPPORT SERVICES

Provide a description of student support programs, services, and activities - general as well as specific to the change - in place to support the change.

One of the seven *Guiding Principles for USF Consolidation* adopted by USF's Board of Trustees is "Commit to 'Students First', through expanding access and raising educational attainment while continuing USF's national best practice of student success and diversity" [1]. As noted in Section 4, following consolidation, academic advising, student advocacy, mental health counseling, financial aid, and career services will be delivered locally on all campuses, guided by USF's Vice President for Student Success, strategic performance expectations, and best practices. The Regional Chancellors (RCs) or their designees, in partnership with the Provost, the VP for Student Success, and College Deans will be responsible and accountable for assuring the equitable delivery of student support services, regardless of campus. The VP for Student Success, College Deans, School Directors, and Department Chairs may delegate these responsibilities to campus chairs, campus directors, campus deans, and other personnel to ensure that students are provided consistent levels of local support on all USF campuses. The Dean of Graduate Studies and the Senior VP for USF Health, or their designees, will work collaboratively with the RCs, the Provost, and College Deans in support of graduate and professional student success.

In preparation for consolidation, the Consolidation Implementation Committee (CIC), described

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in Section 3, formed a Student Success sub-committee. The members of this sub-committee took the "Commit to 'Students First'" guiding principle to heart and began implementing and coordinating best practices across USF T, USF S-M, and USF SP well before consolidation. For example, to enhance undergraduate student success, the members of the sub-committee standardized persistence efforts by empowering local persistence committees to use high quality predictive analytics and retention platforms and practices. They also unified policies and regulations, such as the Student Code of Conduct and the General Student Grievance Process, to ensure that students on each campus benefit from best practices and equal treatment immediately, not waiting for consolidation.

During the spring of 2019, a formal process was initiated by the President of the USF System to centralize some student support functions. This process began with the undergraduate admissions function, because recruitment of the first undergraduate entering class into the consolidated USF needed to begin well before the enrollment of the students during the summer or fall of 2020 [2]. (Work is currently underway to coordinate graduate admissions, across campuses, as appropriate.) Shortly after the centralization of undergraduate admissions, the President directed the Vice President of Student Success at USF T to develop the consolidated USF's unified structure for all student support services, creating a single student success movement, with programs, practices, policies, and the leveraging of technologies that promote student retention, graduation, and success, with minimal levels of debt and higher levels of student satisfaction [3].

Student success operations (i.e., student support services) will be accountable to USF's Vice President for Student Success, who reports to the Provost. Although the VP for Student Success is ultimately responsible for equitable services, each of the campuses in the consolidated USF will have a designated student success leader, who will be responsible for harnessing the expertise and resources that exist on each campus to successfully implement the initiatives developed by the Vice President's cabinet, in accordance with established rules, regulations, and procedures.

The three institutions currently have varying capacities for the depth and breadth of services, because their resources, such as facilities and personnel, differ substantially. For example, USF T and USF SP both have a dedicated student union building and residence halls, but USF S-M has neither. That said, with consolidation the quality of services delivered will be consistent across all three campuses and all students, irrespective of their primary campus, will be provided equitable access to programs and services. How best to do this with available resources is the responsibility of the designated student success leader on each campus, who is accountable to both the VP for Student Success of the consolidated USF and to the Regional Chancellor who oversees campus operations, planning, and budgeting. A detailed listing of student support services that are presently provided on each campus and that will be provided post-consolidation is available here [4]. Close collaboration between college personnel and local student success professionals on each campus, under the proven leadership of the cabinet of the USF VP for Student Success, is expected to result in a student success profile for all campuses and colleges that is befitting of a *Preeminent State Research University*.

While the different facilities, resources, and student needs at each of the three institutions influenced consolidation planning by student success professionals, they also impacted consolidation planning by the Student Government Associations on each campus, which developed a unified Constitution for the consolidated USF that was ratified by the student bodies at each institution [5]. This constitution creates a federated governance system, in which governing bodies on each campus provide a mechanism for local decision-making, while also providing a mechanism through a central student government to address concerns that apply to students on all USF campuses [6]. Efforts are underway to create a set of statutes for the consolidated institution that will be completed before general elections occur in the spring of

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2020 to elect leaders of the consolidated student body for the 2020-21 academic year.

- [1] [Guiding Principles for USF Consolidation](#)
- [2] [Unification of Admissions](#)
- [3] [Unification of Student Success](#)
- [4] [Student Support Services - Detailed Listing](#)
- [5] [Ratified Student Government Constitution](#)
- [6] [Org Chart - Student Government for One USF](#)

8 PHYSICAL RESOURCES

Provide a description of physical facilities and equipment to support the change. Assess the impact the proposed change will have on physical resources, facilities, and equipment.

The consolidation will have immaterial impact on physical resources, facilities, or equipment. The physical resources, facilities, and equipment of each of the separate institutions will be combined and aligned to serve the needs of the consolidated USF, which will serve students, faculty, and staff utilizing physical resources, facilities, and equipment on the main (or parent) campus in Tampa, on branch campuses in St. Petersburg and Sarasota, and at SACSCOC approved off-campus instructional sites, including the recently approved USF Health site and the previously approved Center for Advanced Medical Learning and Simulation, both of which are in downtown Tampa, approximately 10 miles south of the main USF campus. Additional off-campus instructional sites are listed on the Institutional Summary Form and include leased space in the City Port Building located at 250 8th Avenue SE, St. Petersburg, FL [\[1\]](#); a Culinary Innovation Laboratory at 8130 Lakewood Ranch Main Street, Unit D104, Lakewood Florida [\[2\]](#), used by students studying in the undergraduate program in Hospitality and Tourism at USF S-M; and science teaching labs and instructional space at Mote Marine Laboratory, a private non-profit organization located approximately six (6) miles west of USF S-M, which are used by USF S-M students taking science classes [\[3\]](#). USF S-M also has a Shared Services Management Agreement with New College of Florida (5800 Bay Shore Rd, Sarasota, FL), a SACSCOC accredited institution, which is adjacent to USF S-M. This agreement establishes four buildings as shared-use facilities comprising 88,195 gross square feet: Cook Library, the Counseling and Wellness Center, waterfront facilities, and conference and meeting space [\[4\]](#). Students do not take credit-bearing course work in these facilities. Additional agreements provide details about shared library resources [\[5\]](#) and counseling and wellness services [\[6\]](#).

The three existing institutions have adequate facilities, as SACSCOC verified through its review of USF SP's fifth-year interim report in 2017, USF S-M's reaffirmation in 2016, and USF T's reaffirmation in 2015. The main USF T campus (at 4202 E. Fowler Ave, Tampa, FL 33620) has a total of 244 buildings and 20,376 parking spaces on 815 acres, with 780 acres on adjoining property [\[7\]](#). The USF SP branch campus (at 140 7th Avenue South, St. Petersburg, FL 33701) has a total of 30 buildings and 1,897 parking spaces on 52 acres [\[8\]](#). The USF S-M campus (at 8350 N. Tamiami Trail, Sarasota, FL 34243) has nine on-campus buildings and 581 parking spaces on six land parcels totaling a little over 41 acres [\[9\]](#). The effect of the consolidation on the use and allocation of facilities will be negligible. Useable space by type of facility and room counts by room types on each campus are provided here [\[10\]](#). Please note that the USF T and USF SP campuses have residential life space, but the USF S-M campus does not.

Current USF master plans for the three campuses, summarized here [\[11\]](#), encompass the period from 2015-25. Detailed plans for USF T [\[12\]](#), USF SP [\[13\]](#), and USF S-M [\[14\]](#) are also provided. Already conducted as a joint project of all three institutions, the Educational Plant Survey [\[15\]](#), required every five years by the State University System (SUS) of Florida's Board of Governors (BOG), blueprints USF's systemic review of its facilities and space needs. Although USF T, USF SP, and USF S-M currently hold separate SACSCOC accreditations, the BOG considers USF as one for the purposes of facilities planning. Each year, the USF System

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submits a Capital Improvement Plan that sets forth funding requests for capital projects for all three campuses. The latest plan can be viewed here [\[16\]](#).

Due to the current consolidated nature of funding requests, existing coordinated planning, the need to achieve efficiencies and avoid duplication, and in recognition of the distinct needs of daily campus operations, facilities management in the future will be addressed in a hybrid manner. Certain activities require personnel on site to deal with day-to-day activities such as grounds and maintenance – these persons will be campus based. Executive and managerial activities will involve personnel from all three campuses, providing needed local knowledge informed by awareness of the consolidated institution's overall needs.

The USF System is, and the consolidated USF will be, committed to the use of advanced technologies to support student learning and faculty collaboration. In response to student demand for flexible scheduling and increased access to student support resources and course work, faculty and staff have extended the use of technology to support engaged learning and enhanced student success through online, blended/hybrid, and face-to-face courses. USF Innovative Education (InEd) will be an academic support division for the consolidated USF that prioritizes the implementation of consistently high standards, processes, procedures, and resources for distance education. To provide broader access to alternative modes of delivery for existing courses and programs and increase learning opportunities, InEd has extended the use of technology to support engaged learning and enhanced student success through multiple delivery modalities. InEd ensures a culture of continuous improvement in the design and delivery of online and blended/hybrid courses through adoption of Quality Matters and the Florida Online Course Design Quality review process.

Information Technology (IT) on all USF System campuses is currently a centralized operation, with local staff support provided in each location. Services include academic support through a learning management system, technology in classrooms, smart computing labs, lecture capture, and more. Across the campuses, there are over 72 supported computing labs for student use, 54 technology-enhanced auditoriums, and 397 technology-enhanced classrooms. Classroom technology is refreshed on a 5-year cycle. Over 800 printers ranging from student printers, plotter printers and individual printers are supported for students, faculty and staff. At USF T, but available to students and faculty on all campuses, high-end computational resources are provided via three state-of-the-art clusters, one for general research, one for restricted data research, and one for student education. USF's Advanced Visualization Center provides access to 2D and 3D visualization, a 20-megapixel 3D visualization wall, augmented reality systems, virtual reality systems, 3D printing, specialized web viewers, and an Internet-of-Things laboratory. Additionally, the Library's Digital Media Commons provides students with access to cameras and audio equipment, editing tools, multimedia tools, a green screen, and workshops for students to create their own content. At USF S-M, Bloomberg terminals allow students access to Bloomberg Professional Services, which provide real-time data from markets around the world and news, research, and analytics used by decision-makers in finance, business, and government. Additional investments in technology infrastructure are being made on the future branch campuses during the current year to more deeply connect the three campuses post-consolidation and expand delivery of high-quality distance education.

Students and faculty can download over 60 licensed software titles allowing access from anywhere with any device [\[17\]](#). Microsoft Office 365 and Microsoft Teams are used for collaboration and productivity. IT maintains dedicated repair centers available to all students, faculty, and staff for computer repairs on all campuses. This service is free. Walk up support is located on all three campuses. IT also provides online chat and telephone support.

The USF System maintains a very robust high-speed optical fiber ring that not only connects with its multiple campuses and instructional sites, but also links with many research networks,

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especially Florida LambdaRail (FLR) and Internet 2(I2). FLR is Florida's premier 100 Gigabit Research and Education Network and I2 spans across the United States. To access these research networks USF T, as an equity partner, maintains a 10Gbps to FLR. USF SP has 10Gbps connections back to USF T while USF SP buildings are interconnected via 1Gbps connections with 100MB connections to the desktop. USF S-M has a 1Gbps connection back to the USF T. Overall, USF System IT today supports over 6,000 wireless access points across all campuses. Using Eduroam as the wireless access provider, students, faculty, and staff enjoy seamless global wireless access not only throughout the USF System but also while visiting all other participating universities. IT reduces risk of cybersecurity threats by protecting USF's technology assets. The use of robust threat detection and log software to scan all systems connected to the network helps ensure a safe computing environment for the USF System.

- [1] [City Port Building Lease](#)
- [2] [Lakewood Ranch MOU](#)
- [3] [Mote Marine Laboratory MOU](#)
- [4] [Shared Services Agreement with New College of Florida](#)
- [5] [Shared Services Agreement - Cook Library](#)
- [6] [Shared Services Agreement - Counseling and Wellness](#)
- [7] [Building Inventory USF T May 2019 - Final](#)
- [8] [Building Inventory USF SP May 2019 - Final](#)
- [9] [Building Inventory USF S-M May 2019 - Final](#)
- [10] [Square Footage and Room Counts on Each Campus](#)
- [11] [USF System Master Plan PowerPoint 2015-2025](#)
- [12] [Campus Master Plan USF T](#)
- [13] [Campus Master Plan USF SP](#)
- [14] [Campus Master Plan USF S-M](#)
- [15] [USF Educational Plant Survey](#)
- [16] [Capital Improvement Plan April 2019](#)
- [17] [Software Available Through Software Catalogue](#)

9 FINANCIAL SUPPORT

Provide a business plan including all of the following:

- a. a description of the financial transaction and the effect the transaction has on the net assets of all the institutions or entities involved. In addition, specifically provide details regarding each of the following: (1) liabilities, (2) transfer of assets, (3) future contractual obligations, (4) existing contracts, (5) charitable contributions generated or involved with the transaction, and (6) any other significant factor that will impact financial or physical resources;
- b. a description of financial resources to support the change, including a budget for the first year
- c. projected revenues and expenditures and cash flow
- d. the amount of resources going to institutions or organizations for contractual or support services
- e. the operational, management, and physical resources available for the change.

Provide contingency plans in case required resources do not materialize.

Description of the Financial Transaction and Its Effect

The consolidation of the separately accredited institutions in the USF System does not involve the exchange of cash, stock, or any other considerations. Nor does it involve incurring debt, contractual obligations, or other liabilities, or the use of charitable contributions to facilitate the transaction. It is a simple pooling of interests that has no effect on the net assets of the institutions involved or their liabilities, existing contracts, future contractual obligations, or any other significant factor that could potentially impact financial or physical resources. The consolidation of the three institutions that collectively form the USF System, under a single

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SACSCOC accreditation, will preserve a financially strong university while imposing no new obligations on the consolidated entity. Further, because the three institutions in the USF System have in many ways operated like a consolidated entity, the proposed consolidation does not present significant incremental budgetary challenges nor does it necessitate expenditures to synchronize disparate practices and procedures that are present when non-aligned institutions merge. The consolidated financial statements will be very familiar to bond rating entities and other users of USF's financial statements, because USF has been reporting on a combined basis as well as providing campus-level financial data for many years.

Financial Resources: First Year Budget with Revenues, Expenditures, and Cash Flows

USF's Board of Trustees (BOT) approves a budget each year. The budget approval process happens in two stages. First, a "continuation budget" is prepared that is approved by the BOT prior to the beginning of the fiscal year on July 1. This State of Florida practice allows USF to spend appropriated state funds until the fiscal budget is approved, which usually happens in August. The continuation and fiscal budgets are submitted to the Board of Governors (BOG) for approval. The operational budget has two sources of revenue: tuition and state funding. State funding consists of a general revenue appropriation and lottery profits. Due to the performance-based funding model used by the state [\[1\]](#), budget planning is necessary and is arguably more data driven than in many higher education institutions. This focus on performance metrics, especially those related to student retention, graduation rates, and other indicators of student success, has motivated the USF System and its consolidating member institutions to obtain a more granular understanding of students and hence, a better ability to estimate tuition revenue than many other institutions.

Recent history of base-funding appropriation in Florida creates fairly conservative planning parameters. While there have been some increases in Preeminence funding, those monies have largely been reserved to attract and retain world-class faculty. With no increases in tuition or fees authorized since 2013-14 and a desire by the USF President and BOT to hold enrollment flat, financial planning is fairly straightforward and argues for a flat plan for the current year (for the USF System) and for the year ending June 30, 2021 (for the consolidated USF). This approach has the added advantage of not relying on aggressive revenue goals or budget cuts to facilitate the success of the consolidation. It also negates the need to develop a contingency plan. The budget for fiscal 2020 and plan for 2021, which provides projected revenues, expenditures, and cash flows, is available here [\[2\]](#). For the sake of simplicity, account balances, including accruals, revenues, and expenses are assumed level for FY 2020 and 2021. The GASB treatment of appropriations as "non-operating" has been ignored to simplify presentation. This yields net cash used of \$13 million for both years. Bolstered by budgetary savings from open positions and other efficiencies, USF will have sufficient cash for unforeseen expenses relating to consolidation or other demands.

Resources Going to Institutions/Organizations for Contractual Support Services

No resources are going to institutions or organizations as payment to facilitate consolidation. However, the USF System and its member institutions currently outsource some services, including dining, bookstore, security, and other services deemed advantageous (e.g., for specialized legal services, certain types of maintenance and repairs, software-as-a-service and internet cloud services).

Operational, Management, and Physical Resources Available for Consolidation

The consolidating institutions, all SACSCOC-accredited members of the USF System, have many operational, management, and physical resources available to facilitate consolidation. The USF System and its member institutions are financially strong. Collectively, they have a modest amount of debt compared to peer institutions and that debt is at fixed rates with level amortization [\[3\]](#). Furthermore, with the exception of one research building, no new borrowing plans are on the horizon, allowing a strategic deployment of debt by the consolidated institution

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should the need arise. Good ratings from Moody's [4] and S&P [5] (Aa2, with some issues rated in the A to Aa range – Florida statutes do not allow crossing revenue pledges between issues, so a consolidated rating is not possible), strong credit opinions [6] and financial ratios [7] (low debt to operating expense, high liquidity, and over 200 days of cash on hand), and a sizable endowment (\$514 million as of fiscal year end on June 30, 2019) would allow USF to borrow at low cost should the need arise. In addition to well managed debt, USF has a successful, conservative investment record, in which endowment assets held by the USF Foundation performed in the top decile compared to other college endowments and short-term investments, managed internally, outperformed the state's short-term investment pool [8]. Additionally, USF has received unmodified audit opinions for the years ending on June 30, 2017 [9] and June 30, 2018 [10]. Separate financial statements for USF T, USF SP, and USF S-M are provided for FY 2018 [11] and FY 2019 [12]. (The audit for FY 2019 is not yet complete, but it will be forwarded to SACSCOC when it is received.) USF did not receive any management letter comments in its latest audit because, as the Auditor General of the State of Florida noted [13], "the results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards*."

The Auditor General periodically performs a statewide "A-133/single audit" that encompasses USF's expenditures of federal financial aid and grants and contracts. These audits have resulted in unmodified opinions on the schedule of expenditures of federal awards and internal controls and have never cited a material weakness or significant deficiency at USF. The latest single audit for the 2018 fiscal year [14] had a single finding relating to USF. That finding detailed that in a single instance, USF paid a vendor after it had obtained federal reimbursement [15]. Note that this finding, on page 75, is specific to research and development. **USF had no findings related to Financial Aid.** Note that this is a statewide federal audit involving multiple institutions across the state, so the report is long. The pertinent sections in this long report are on pages 1-11 and page 75.

USF is subject to an annual operational audit that tests compliance with state laws and regulations. The operational audit for fiscal 2018 [16] found immaterial compliance issues that subsequently were remedied [17]. These results demonstrate that USF has the expected internal control mechanisms governing compliance with federal financial aid and grants and contracts from the federal government and other granting organizations.

This sound financial status can be attributed to the knowledge, skills, and experience of the USF System's financial leadership team and to the success of USF's Foundations and other Direct Support Organizations. USF's financial leadership team members all have significant experience in higher education. Most complement that background with work in the private sector. Several have earned CPA credentials. This team and their supporting staff position USF well to support the academic enterprise through and following the consolidation process. The USF System and its member institutions are also served well and assisted by ten Direct Service Organizations (DSO). These DSOs are authorized by Florida Statutes. They provide special support services and supplemental resources to the institutions and their faculties and staff. A recap of each of the DSOs can be found here [18]. The DSO's are all included in the audited financial statements of USF as discrete component units. In addition, each DSO has a separate audit. One of these DSOs is the USF Foundation, which had \$514 million in endowment assets when the most recent fiscal year ended on June 30, 2019. Its audited financial statements for 2018 and 2019 can be viewed here [19] and here [20]. The USF Foundation, which uses a spending policy of 4% and charges a 1.95% management fee on balances to fund operations, presently serves all three separately accredited institutions in the USF System and will serve the consolidated USF following consolidation. Unlike many universities, there is little dependence on the Foundation's endowment for operating expenses. USF also has a blended component unit, USF Financing Corporation, which issues bonds on behalf of USF.

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A statement of financial position of unrestricted net assets, exclusive of plant assets and plant-related debt, which represents the change in unrestricted net assets attributable to operations, as of and for the year ended June 30, 2019, is provided here [21]. A multi-year view is provided here [22]. As the unrestricted net assets table shows, net of pension liabilities and other post-employment benefits, USF offers a very stable financial picture.

- [1] [Performance-Based-Funding-Overview-May-2019](#)
- [2] [USF Budgets Pre- and Post-Consolidation](#)
- [3] [Debt Report to Board of Trustees - August, 2019](#)
- [4] [Moody's Rating Report for USF Financing Corp - 2018](#)
- [5] [S&P's Rating Report for USF Financing Corp - 2018](#)
- [6] [Moody's USF credit opinion - November 2018](#)
- [7] [USF Financial Ratios - FY 2015 through 2019](#)
- [8] [Investment Report to the Board of Trustees - August, 2019](#)
- [9] [USF System Financial Audit Report for Year Ending on June 30 2017](#)
- [10] [USF System Financial Audit Report for Year Ending on June 30 2018](#)
- [11] [Financial Statements for USF T, USF SP, and USF S-M for Year Ending on June 30, 2018 \(excerpted from USF System Financial Audit Report\)](#)
- [12] [Financial Statements for USF T, USF SP, and USF S-M for Year Ending on June 30, 2019](#)
- [13] [Auditor's Letter Explaining Absence of Management Letter Accompanying Financial Audit Reports](#)
- [14] [Most Recent Financial Aid Audit \(Statewide Single Audit - FY 2018\)](#)
- [15] [USF Finding from Statewide Single Audit \(Federal R&D Funds\) - FY 2018](#)
- [16] [Auditor General Operational Audit - February 2018 \(Report 2018-105\)](#)
- [17] [Auditor General Operational Audit - August 2019 \(Report 2020-014\)](#)
- [18] [Direct Support Organization Descriptions - 2019](#)
- [19] [USF Foundation Audited Financial Statements - FY 2018](#)
- [20] [USF Foundation Audited Financial Statements - FY 2019](#)
- [21] [Statement of Financial Position of Unrestricted Net Assets - June 30, 2019](#)
- [22] [Unrestricted Net Assets Recap - June 30, 2015 to June 30, 2019](#)

10 EVALUATION AND ASSESSMENT

Describe how the institution assesses overall institutional effectiveness and the means used to monitor and ensure the quality of the changes. Summarize procedures for systematic evaluation of instructional results, including the process for monitoring and evaluating programs and using the results of evaluation to improve institutional programs, services, and operations. Explain how the change has or will affect the institution's strategic planning including the development of campus master plans.

Overall Institutional Assessment

The three consolidating institutions, USF T, USF SP, and USF S-M, engage in systematic, ongoing, integrated, and institution-wide research-based planning, evaluation, and budgeting processes to ensure continuous quality improvement in their programs, services, and operations. Processes for the assessment of institutional effectiveness in the consolidated USF will incorporate the strongest components from each institution's evaluation systems and processes and leverage the State University System of Florida's Board of Governors' (BOG) annual planning, performance, and accountability cycle [1].

The USF Board of Trustees (BOT), which is the governing board for each of the three separately accredited institutions participating in this consolidation, annually approves an Accountability Plan for each of the three consolidating institutions separately, and a combined Accountability Plan for the USF System [2], for submission to the BOG. Moving forward, USF will develop a single Accountability Plan for the consolidated institution that will reflect the

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recently developed mission and goals for the consolidated institution, which are described in Section 2 of this prospectus.

Performance accountability across all three campuses will be aligned with clearly defined decision-making responsibility. College Deans, Department Chairs, and their branch campus designees (e.g., campus deans, campus associate/assistant deans, local department/college leaders, and RCs) are responsible for academic quality assurance across their academic units.

College Deans, in consultation with the Provost, Vice President for Student Success, and RCs, are directly responsible for strategic performance decision-making and performance outcomes across their colleges to enhance USF's position and stature with regard to Preeminence, Performance-Based Funding, and progress toward meeting strategic plan goals. Annually, the consolidated USF's Accountability Plan will outline our top priorities, strategic directions, and the specific actions planned for their achievement. Previously approved goals relating to teaching, research, innovation, and key fiscal performance indicators, as well as projections of future performance, will be examined. Additionally, any planned changes in the academic portfolio of the institution will be described.

The comprehensive planning, performance and accountability cycle at the macro level of the institution is currently vertically integrated and reproduced at multiple micro levels at USF T, and will be fully implemented across the Colleges and campuses in the consolidated USF. Each year, colleges (and academic and student support units) will undergo a comprehensive review process, in which performance will be examined relative to goals for teaching, research, service and the stewardship of resources. New goals will be collaboratively set, based on analysis of past-performance and in consideration of the college/unit's strategic direction aligned with the University's mission and goals. Quarterly, the Planning-Performance-Accountability (PPA) matrix, which shows progress towards goals, will be updated for each college/unit, so that ongoing and continuous actions to improve performance can be initiated. An example PPA matrix as currently implemented in USF T is available here [\[3\]](#). This matrix documents which PPA metrics are used in annual College/Unit Review data packets (CR), in the annual Accountability Plan (AP), in formulas used to determine performance-based funding allocations [\[4\]](#), in formulas used to determine which State Universities are worthy of the *Preeminent State Research University* designation [\[5\]](#), in performance evaluations used to determine membership in the American Association of Universities (AAU), and in rankings reported by *US News & World Report* (USNWR). USF T has long aspired to AAU membership eligibility and a top 25 ranking among public institutions in *US News & World Report*. These will be aspirations for the consolidated USF. Many of the same performance metrics that are used in College Reviews for USF T are also used in Academic Program Reviews, to keep all levels of the institution focused on achieving key success objectives.

In the consolidated USF, the PPA cycle will be implemented across all three campuses and, under the leadership of the USF Office of Decision Support (ODS), the RCs or their designees will be responsible and accountable for monitoring campus-level performance outcome data on their branch campus, which will be delivered to each College Dean, along with college-level performance data. Under the direction of the Provost, and ultimately the USF President, ODS will remain responsible and accountable for collecting, verifying, archiving and reporting the University's performance outcomes (consolidated for all campuses) to both internal and external constituent groups in accordance with USF Policy 11-007 [\[6\]](#).

The PPA cycle is only one process by which the consolidated USF will set goals and measure ongoing performance in support of continuous improvement. The consolidated institution will rely on a combination of measures, many of which are required for external reporting, and all of which have proven useful through ongoing internal assessment processes. As One University Geographically Distributed, the consolidated USF will leverage its current expertise in

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Institutional Effectiveness (IE) and Institutional Research (IR), housing those functions in an integrated Office of Decision Support (ODS), which will continue to provide timely, actionable data and analyses needed for evidence-based decision-making by faculty and administrators responsible for improving institutional quality and assuring that USF accomplishes its mission and achieves its goals. As is current practice at each institution, the faculty and staff in all educational programs and in units supporting administration, students, research, and service, will continue to engage in collaborative setting of goals that align with USF's mission and strategic plan. Performance relative to goals will be regularly assessed and evidence of program/unit improvement based on analyses of the assessment results will be documented.

Procedures for Systematic Evaluation of Instructional Results

The current systematic assessment of academic instruction and educational programs across the three campuses is continuing and consolidation provides an increased opportunity for the identification and implementation of the best practices already in effect at each of the individual institutions. BOG Regulation 8.016 [\[7\]](#) requires learning outcomes assessment at the undergraduate level and USF System Policy 10-060 [\[8\]](#) also requires learning outcomes assessment for all graduate programs, and assessment of programs that support student success. Moving forward with consolidation, the BOG regulation and USF policy will assure that each program, regardless of mode of delivery: (a) Outlines expected student learning outcomes in the areas of content/discipline-specific knowledge and skills, communication skills, and critical thinking skills; (b) Develops methods for assessing student achievement of the defined outcomes; (c) Assesses student achievement of the outcomes; and, (d) Uses the evaluation results to improve student learning and program effectiveness.

To prepare for consolidation, discipline-specific and general education workgroups composed of faculty from all three institutions aligned and integrated the curricula, developed student learning outcomes, and are in the process of developing and/or modifying assessment procedures to ensure consistent academic content and quality in all programs across all USF campuses. An example of the work completed to date involves detailed information about the General Education curriculum and the assessment plans in place for it [\[9\]](#), reflecting the consolidated USF's commitment to two unique facets of assessment: (1) Assessment of the implementation of the General Education program (Alignment; Fidelity) and (2) Assessment of student learning outcomes (Samples of Student Work). The USF Faculty Senate's consolidated General Education Council (GEC), with faculty representatives from all three campuses, will use a multidimensional system of assessment to help continuously improve both the assessment itself and the overall program/curriculum.

In addition to the work of the GEC, faculty teaching in each of the academic degree programs in the consolidated USF will continue to refine student learning outcomes (SLOs) at the program level, assess the extent to which these outcomes are achieved, and use the results to improve educational programs and maximize student learning. Ongoing assessment of SLOs and concomitant implementation of continuous improvement activities emanating from the assessment results will inform our 7-year cycle of comprehensive academic program review, as specified by SUS of Florida BOG Regulation 8.015 [\[10\]](#) and USF Policy 10-062 [\[11\]](#). While all academic degree programs are subject to cyclical comprehensive review, this process is also linked to requirements of specialized/professional accrediting bodies, which currently accredit over 100 programs offered across the USF System. The rigorous processes involved in meeting the requirements of these specialized accrediting bodies provide another integrated layer of institutional effectiveness that will continue post consolidation.

The work described above is currently supported by separate Institutional Effectiveness units on each campus. Moving forward, consolidation provides for the synergistic integration of all IE professionals into a single unit, with local campus presence, to oversee and support in a consistent fashion our commitment to continuous improvement, not only of our academic

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programs, but also our academic and student support services that support student success, and other administrative units, as briefly described below.

USF's Institutional Effectiveness unit will continue to support the academic and student services units that support student success as they define their missions, establish their goals, develop plans for assessing outcomes associated with those goals, and use the results of assessment for improvement, so that key processes that meet the needs and expectations of students, parents, employers, faculty and other stakeholders can be improved on a continuous basis. Similar to the aforementioned annual College Reviews, academic and student service support units will participate in an annual PPA process involving both unit and executive academic leadership. The data-driven PPA process provides a mechanism for reviewing progress towards goals and the collaborative setting of new, vertically integrated goals. It also informs resource allocation. The IE unit will continue to work with other administrative units as they too are required to develop integrated operational goals, set data-driven performance targets, and evaluate their performance against those targets. Under the purview of executive leadership, these goals and related performance-accountability reviews will remain as explicit parts of the consolidated institution's budgeting and strategic planning processes.

The USF-wide academic and student support leadership team, which includes the Provost, Vice President for Student Success, College Deans and Regional Chancellors, supported by the USF SACSCOC liaison, will provide unified leadership to assure compliance with SACSCOC Principles of Accreditation and SACSCOC Policy Statements.

Consolidation's Impact on Strategic and Master Planning

On July 1, 2019, the University of South Florida's 7th president, Dr. Steven Currall, began his tenure. Under President Currall's leadership, the faculty, staff, students, alumni, and community stakeholders from across the three campuses are enthusiastically beginning a strategic renewal process for the consolidated USF. The mission and goals approved by USF's BOT **on December 3, 2019** [12] and the national peers and aspiration peers identified by university leadership [13] will provide a foundation for the strategic renewal process, which will be guided by peer benchmarking and informed by stakeholder input. The strategic renewal process will identify academic and research priorities, which in turn will inform any changes to our current campus master plans, which were developed and approved by both USF's BOT and the SUS of Florida's BOG, pursuant to Section 1013.30 Florida Statutes [14], and BOG Regulations, Chapter 21 [15], and USF Policy 6-021 [16]. Evidence of progress on the strategic renewal process and the campus master planning process will be included in the Documentation for the Substantive Change Committee at least six weeks prior to the site visit.

- [1] [BOG Regulation 2.002 - Accountability Plans](#)
- [2] [USF System Accountability Plan 2019](#)
- [3] [Planning, Performance, and Accountability Matrix Example 1](#)
- [4] [Performance-Based-Funding-Overview-May-2019](#)
- [5] [Preeminent Metrics Methodology 2019-20](#)
- [6] [USF Policy 11-007 - Data Submission to External Entities](#)
- [7] [BOG Regulation 8.016 - Student Learning Outcomes Assessment](#)
- [8] [USF Policy 10-060 - Academic Learning Compacts and Student Learning Outcomes](#)
- [9] [Assessment Plan for Enhanced Gen Ed](#)
- [10] [BOG Regulation 8.015 - Academic Program Review](#)
- [11] [USF Policy 10-062 - Academic Program Review and Specialized Accreditations](#)
- [12] [USF's Mission and Goals - Updated](#)
- [13] [USF's Peer Institutions](#)
- [14] [Florida Statute 1013.30 - Campus Master Plans and Campus Development Agreements](#)
- [15] [BOG Regulation 21.202 - Campus Master Plans General Requirements](#)
- [16] [USF Policy 6-021 - Campus Master Planning Program](#)

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11 APPENDICES

Provide copies of documents appropriate to the change. For a merger/consolidation or an acquisition, the prospectus must include a complete list of all off-campus instructional sites including branch campuses that will exist after the merger/consolidation or acquisition; a template with instructions is provided on the following pages.

Prospectus Supporting Documents

USF System Financial Audit Report for Year Ending on June 30, 2019 (Not yet available from Florida's Auditor General)

USF System Financial Audit Report for Year Ending on June 30, 2018 [1]

USF System Financial Audit Report for Year Ending on June 30, 2017 [2]

Auditor's Letter Explaining Absence of Management Letter Accompanying Financial Audit Reports [3]

Most Recent Financial Aid Audit (Statewide Single Audit - FY 2018) [4]

Financial Statements for USF T, USF SP, and USF S-M for Year Ending on June 30, 2019 [5]

Financial Statements for USF T, USF SP, and USF S-M for Year Ending on June 30, 2018 (excerpted from USF System Financial Audit Report) [6]

Statement of Financial Position of Unrestricted Net Assets - June 30, 2019 [7]

Post-Consolidation Off-Campus Instructional Sites and Branch Campuses [8]

Correspondence with the US Education Department about Consolidation (More Coming Soon)

A "Pre-Acquisition Application" is not required for this type of consolidation of public institutions. US Education Department Communication about IPEDS [9]

[1] [USF System Financial Audit Report for Year Ending on June 30 2018](#)

[2] [USF System Financial Audit Report for Year Ending on June 30 2017](#)

[3] [Auditor's Letter Explaining Absence of Management Letter Accompanying Financial Audit Reports](#)

[4] [Most Recent Financial Aid Audit \(Statewide Single Audit - FY 2018\)](#)

[5] [Financial Statements for USF T, USF SP, and USF S-M for Year Ending on June 30, 2019](#)

[6] [Financial Statements for USF T, USF SP, and USF S-M for Year Ending on June 30, 2018 \(excerpted from USF System Financial Audit Report\)](#)

[7] [Statement of Financial Position of Unrestricted Net Assets - June 30, 2019](#)

[8] [Post-Consolidation Off-Campus Instructional Sites and Branch Campuses](#)

[9] [US Education Department Communication about IPEDS](#)

Agenda Item:

USF Board of Trustees
December 3, 2019

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 recommendations of the President. Consistent 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.

USF St. Petersburg Campus Board Appointment:

Melissa Seixas is vice president, government and community relations for Duke Energy Florida. She directs the company's efforts to strengthen relationships with municipal, community and civic organizations and business leaders throughout the company's 35 county service area in order to best meet their needs. Ms. Seixas is also responsible for strategic planning of customer satisfaction efforts from the state president's office and directing support of employee engagement. Ms. Seixas is a veteran of customer service and operations at Duke Energy. She joined Florida Power in 1986, starting in distribution engineering, and serving in a number of leadership roles including customer service manager and community relations manager for Pinellas and Pasco counties. Ms. Seixas has a strong tradition of supporting her community. She has served as a board member for many community organizations including the Clearwater Marine Aquarium, Ruth Eckerd Hall, Pasco County Economic Development Council, and the Pinellas County Urban League, and served as co-chair for the year-long celebration of USFSP 50th Anniversary in 2015-2016. She also was the USFSP Campus Board Chair's appointment to the USF Consolidation Task Force. Ms. Seixas is the current chairwoman of the Board for the St. Pete Downtown Partnership. She holds a bachelor's degree from Eckerd College, a master's degree the University of South Florida and a professional certification in Corporate Social Responsibility (CSR) from Johns Hopkins University.

Ms. Seixas is eligible for a four year appointment ending June 30, 2023.

Supporting Documentation Online (please circle): **None**
Prepared by:

Agenda item: FL118

USF Board of Trustees
Tuesday, December 3, 2019

Issue: Chair Emeritus

Proposed Action: Approval of Chair Emeritus Title for Trustee Hal Mullis

Background information:

Today is Trustee Hal Mullis' last meeting as his term on the Board ends January 6, 2020. In an effort to honor Trustee Mullis for his service as Board Chair 2014-2016 and for his dedication to USF and our Board. A few of the accomplishments that occurred during his chairmanship included:

- *Celebrated breaking the \$900 million milestone, including over \$60 million in donations, including some of the largest gifts in USF history:*
 - *Les and Pam Muma's gift to USF College of Business of \$25 million;*
 - *Kate Tiedemann gift of \$10 million for Tiedemann College of Business;*
 - *Jordan Zimmerman gift of \$10 million for Zimmerman Advertising*
 - *Lynn Pippenger gift of \$10 million for Muma College of Business and \$5 million for USFSP Tiedemann College of Business*
 - *Dana and Barron Collier gift of \$10 million for Muma College of Business*
 - *Ellen Cotton gift of \$1 million for Tiedemann College of Business*
- *University's research funds increased to more than \$440 million*
- *USF System ranked 33 in total research expenditures for public institutions by the National Science Foundation*
- *USF System ranked 13th world-wide for granting U.S. patents among all universities; 1st in Florida*
- *USF consistently ranked among the top tier of colleges listed in the US News & World Report for Best Colleges, ranking in the top 100 of best public schools*
- *Qualified for Florida Emerging Preeminence status and top tier of performance based funding*
- *Morsani College of Medicine achieved history with its CORE class average MCAT score the highest among all medical schools in Florida*
- *USF Tampa received SACS re-accreditation without any follow up actions*
- *USF Sarasota-Manatee achieved BOG approval to accept freshman and sophomore level students.*

We are excited that Trustee Mullis will not go too far as the Chair is going to appoint him to serve on University Medical Services Association. As a Board member for (UMSA) and USF Medical Services Support Corporation (MSSC) he will be able to continue his work with the Sr. VP for USF Health and the University President on enhancing the partnership between the University and Tampa General Hospital.

With Board approval, Trustee Mullis will carry the title Chair Emeritus of the USF Board of Trustees for life.

Prepared by: Dr. Cindy Visot, Assistant Corporate Secretary