

USF CONSOLIDATION

Academic and Student Success Implementation Handbook



I: January 9, 2020

II: January 16, 2020

Office of the Provost and Executive Vice President

VOLUME 2



UNIVERSITY of
SOUTH FLORIDA

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**USF CONSOLIDATION
ACADEMIC AND STUDENT SUCCESS
IMPLEMENTATION HANDBOOK**

Office of the Provost and Executive Vice President



Faculty Senate Elections

Prior to consolidation, each USF campus has its own Faculty Senate, each with a constitution and bylaws, and a mechanism of apportioning members. The three Faculty Senates are the primary advisory bodies to the USF Administration in regard to the academic climate and academic mission of the University. A separate body known as the System Faculty Council (SFC) coordinates the activities of the three senates and is composed of faculty members representing each campus. The president of the SFC currently serves as the faculty representative to the USF Board of Trustees.

The three Faculty Senates and the SFC worked together to define a single consolidated Faculty Senate and discontinue the SFC. This process is nearly complete, with a new single constitution and a single set of bylaws approved by all three Senates, the general faculty, and President Currall. The consolidated Faculty Senate will be composed of all current Senate members from all three campuses whose terms extend across the Summer of 2020. The new Senate and/or the SFC will direct elections to fill any remaining seats in March of 2020 according to the processes in the consolidated Senate constitution and bylaws. Finally, elections for the Senate Officers will be carried out by the new Senate in April 2020. The SFC and the three campus senates will dissolve on June 30, 2020 and the new consolidated USF Faculty Senate will officially begin on July 1, 2020. The elected president of the consolidated Faculty Senate will become the faculty representative to the USF Board of Trustees.

In general, apportionment is done by department in Academic Affairs and by College in USF Health. Each Academic Affairs department elects a single senator, while the USF Health Colleges get the same ratio of senators to faculty members as in Academic Affairs. It is recommended that new departmental governance documents include a simple voting process to select their Senate representative. The representative must be elected by the departmental faculty and may not be appointed by the Chair. The new Constitution has a provision for additional senate seats (at-large) for faculty with a regional campus academic home under certain circumstances. In addition, two regional senate councils have been established, one for the St. Petersburg campus and one for the Sarasota-Manatee campus, to advise the Faculty Senate and USF administration on matters of interest to the faculty of those respective campuses. The chairs of all Senate Councils, including these two councils serve on the Faculty Senate Executive Council.

College, School and Department Governance

Multi-campus academic units will need to review their College, School and Departmental governance documents as necessary to adjust for new processes and changes or additions of roles, relationships and responsibilities of unit faculty and administrators required by their multi-campus status. This process must engage faculty “voices” across all campuses on which the unit has representatives. The review should include academic unit committees and councils, the inclusion of campus deans, campus assistant/associate deans, campus directors and both departmental and campus chairs if needed. The roles, relationship, and responsibilities of each person with an administrative role should be carefully defined, and their selection and length of terms be clearly delineated. Their structure, role, responsibilities and relationships should be consistent with the consolidation documents (University of South Florida as “One University Geographically Distributed”) and the Guiding Principles for consolidation as outlined by the USF BOT. Academic units with a presence on branch campuses should recognize the relationship and role of regional chancellors, especially regarding recruitment and evaluation of faculty. The revised governance documents should reflect how the multi-campus unit handles hiring, appointment, and evaluation of faculty and staff. There should be a process to evaluate and coordinate teaching needs across campuses. The revised documents should specifically address equity of assignment and resources available to faculty across campuses. There are three potential academic unit situations that will require governance document revision:

1. Departments/Schools that will continue solely on a single campus in a College that will also continue solely on a single campus. These units may need to make minimal changes to their governance.
2. Departments/Schools that will continue on a single campus but belong to a College with a multi-campus presence. These units will need to accommodate any changes in their College Governance associated with a multi-campus presence.
3. Departments/Schools with a multi-campus presence will need to modify their governance documents extensively to accommodate and include faculty from other campuses into their departmental structure and processes.

TIMELINE:

College Governance Documents should be completed first and are due to Madeleine Hershberger (813-974-2010, mhershberger@usf.edu) in the Provost’s Office no later than **February 28th**. Please expect a 10 day turnaround time for approval. Once the College documents are in place, the Departments and Schools will have until **April 8th** to submit their governance documents to Madeleine Hershberger (813-974-2010, mhershberger@usf.edu) in the Provost’s Office for approval, leaving the remainder of April for final editing and adjustments between the College, Departments and Provost’s Office, completed by **April 30th**.

Multi-campus units should accommodate the complexities of attendance at faculty and committee meetings. There should be provisions for defining a quorum and establish voting procedures that address the complexities of a multi-campus unit. Each Department or equivalent unit should have a process to elect faculty senators that is consistent with the new Faculty Senate guidelines. Faculty at different campuses should have an equitable opportunity to engage in faculty governance and evaluation.

College, School and Department Governance

REVISING GOVERNANCE DOCUMENTS

All aspects of College, School and Department governance should be consistent with USF Policies and the USF UFF Collective Bargaining Agreement (<https://www.usf.edu/hr/documents/employment-resources/employee-labor-relations/uff-collective-bargaining-agreement.pdf>). College Governance documents should be revised and approved prior to those of its component schools and departments to ensure consistency and integration of the documents.

A complete governance document should include the following but may include other items:

Faculty types

Tenured/Tenure track, Instructor/Lecturer, Courtesy, Affiliate, Joint, Emeritus, Adjunct, etc. Voting rights, roles and responsibilities, and requirements of each type. Note that the categories of faculty must be consistent with USF hiring/appointment practices and established job codes.

Chair/Director:

Eligibility, selection, term, roles, relationships, responsibilities, evaluation. Responsibilities directly managed by the Chair would be included here. Any responsibilities delegated to committees would be included below.

Other administrative positions:

Typically Associate Chair, Graduate Director, Undergraduate Director, Campus Chair. This should include eligibility, selection, term, roles, relationships, responsibilities, evaluation.

Standing Committees:

Name each standing Committee and associated guidelines and responsibilities including any requirements for minutes, quorums, how conducted (e.g Robert's Rules). The Chair appoints most committees, some are elected, but there can be other processes.

Faculty Advisory or Evaluation Committee:

This or a similar committee is normally elected by the faculty and plays an important role in annual evaluations of faculty and in some units may serve as the Tenure and Promotion committee in which case it plays a central role in mid-tenure review, as well as tenure and promotion review (see Tenure and Promotion Committee below). The annual evaluation process and criteria need to be set in place by a faculty vote as required by the USF UFF Collective Bargaining Agreement (<https://www.usf.edu/hr/documents/employment-resources/employee-labor-relations/uff-collective-bargaining-agreement.pdf>) Article 14.2 and posted or otherwise made available to the faculty, and included in the governance document. Note that faculty can request an appraisal of their progress toward promotion that shall be included as a separate component of the annual evaluation. For faculty at a branch campus, the Regional Chancellor will have the opportunity to provide annual evaluation input prior to the evaluation moving to the College Dean.

College, School and Department Governance

Curriculum Committees:

There are usually a variety of academic curriculum committees in charge of various departmental undergraduate and graduate programs.

Tenure and Promotion Committee:

The Tenure and Promotion Committee is ordinarily responsible for mid-tenure review as well as tenure and promotion review. In some academic units, T&P reviews are carried out by the Faculty Advisory, Executive or Evaluation Committee as described above but it is recommended that T&P committees be separate from the committee responsible for annual evaluations.

There are two models of Tenure and Promotion Committees: (1) Committee of the Whole in which all faculty of a given rank are required to serve. For example, for evaluation of a candidate to Associate Professor, all Associate and Full Professors must serve. (2) T&P Committee with a fixed number of faculty who are usually elected. In either case, provisions should be made for all types of faculty promotion including Instructor/Lecturers. Note that T&P committee faculty must have been appointed in the academic unit for at least two years.

New or Ad Hoc committees:

There should be a provision to allow the formation of new standing committees or temporary Ad Hoc committees.

Faculty Meetings and Voting Policies:

Frequency of meetings, notice of meetings, agendas, quorums, voting processes, proxies, secret ballots, voting eligibility, and rules of order should be included.

Processes:

Faculty and Staff search processes. Joint, affiliate, courtesy, adjunct appointment processes. Relationships to home college and any processes related to multi-campus status.

Amending the Governance Document:

A statement concerning the process to amend the governance document should be included.

Please be sure your revised documents are well organized and carefully written. Proposed governance documents should be sent in Word format by email to Madeleine Hershberger (813-974-2010, mhershberger@usf.edu) in the Provost's Office. If the revisions are minor, they can be marked up from the original document using strikeout fonts to delete passages and underlined fonts to indicate new passages. This will expedite the approval process. For major revisions or complete rewrites, please provide an unrevised original document along with the newly revised document (markups not necessary). Please use the Word "comments" feature to annotate or ask questions about certain parts of the document.



College, School and Department Governance

USEFUL REFERENCES

<https://www.usf.edu/system/documents/system-consolidation/usf-one-university.pdf>

<https://www.usf.edu/hr/documents/employment-resources/employee-labor-relations/uff-collective-bargaining-agreement.pdf>

<http://regulationspolicies.usf.edu/policies-and-procedures/pdfs/policy-10-116.pdf>

<http://regulationspolicies.usf.edu/policies-and-procedures/pdfs/policy-10-116.pdf>

<http://regulationspolicies.usf.edu/regulations/pdfs/regulation-usf10.105.pdf>

<http://regulationspolicies.usf.edu/regulations/pdfs/regulation-usf10.108.pdf>

<https://www.usf.edu/provost/faculty/tenure-promotion.aspx>

Faculty Tenure and Promotion Guidelines

THE NEW CONSOLIDATED USF TENURE & PROMOTION GUIDELINES

University of South Florida GUIDELINES FOR TENURE AND PROMOTION

Effective July 1, 2020

This document presents University of South Florida guidelines for the tenure and promotion process consistent with the Board of Trustees regulations USF10.105 and USF10.106, USF System policy 10.116, and the Collective Bargaining Agreement, and with the intent of furthering the mission of the University. Criteria for tenure and promotion, specifying documented and measurable performance outcomes, must be developed by individual colleges and departments, commensurate with expectations articulated in this document.

I. UNIVERSITY OF SOUTH FLORIDA CRITERIA

Tenure for faculty with tenure-earning appointments and promotion in the professorial ranks will be granted only to persons who demonstrate excellence in scholarly and academic achievement. Performance is evaluated specifically in the areas of teaching/instructional effort toward student learning, research/creative/scholarly activity, and service. In addition, participation as a citizen of the University is an integral part of faculty performance.

The academic units of the University will define criteria for tenure and promotion according to the standards of their respective fields and disciplines, with specific expectations for types and levels of achievement and how they will be measured and documented. Tenure and promotion guidelines at all levels are expected to recognize and value contributions that support USF's prevailing strategic priorities. Academic units may specify more stringent standards than those articulated herein but may not specify less stringent standards. However, deans may apply to the institution's designated senior academic officer for variance in exceptional cases.

A. Tenure

1. Expectations of tenured faculty.

In order for the University to perform its functions effectively, it is essential that faculty members be free to express new ideas and divergent viewpoints in their teaching and research. In the process of teaching and research, there must be freedom to question and challenge accepted "truths." A university must create an atmosphere that encourages faculty members to develop and share different ideas and divergent views and to make inquiries unbounded by present norms. Tenure contributes significantly to the creation of such an atmosphere.

At the same time, in providing for "annual reappointment until voluntary resignation, retirement, or removal for 'just cause' or layoff" (USF System Regulation USF10.105), tenure is not an unconditional guarantee of lifelong employment. The granting of tenure is a privilege that carries enormous responsibility within the academic unit, the college, the University, and broader academic community. This responsibility includes maintenance of the highest academic standards, continued scholarly productivity, sustained teaching excellence, and ongoing beneficial service carried out in the spirit of University citizenship.

Effective July 1, 2020

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2. Evaluation for Tenure

Evaluation for tenure involves three components appropriate to the unit:

- Teaching or comparable activity designed to promote student learning (including advising, mentoring, and community-engaged instruction);
- Research/creative/scholarly work (including community-engaged scholarship);
- Service to the University, the profession, and the community.

Because the decision projects lifetime performance from the first few years of a faculty member's career, tenure must be awarded only as a result of rigorous assessment over a period of time sufficient to judge the faculty member's documented accomplishments, ability, and probability of sustained future productivity. A judgment must be made that the faculty member's record represents a pattern indicative of a lifetime of continued accomplishment and productivity with potential for high impact on the field or society. Each recommendation for tenure should be accompanied by a statement of the mission, goals and educational needs of the department and college and the importance of the contributions the candidate has made and is expected to make in the future toward achieving the mission and goals and meeting the educational needs of the unit and the University. Careful consideration must also be given both to the equitability of the candidate's assignment and opportunities in relation to others in the department/unit and to the candidate's ability and willingness to work cooperatively within the department, college, and/or campus.

Integral to the mission and vision of USF is commitment to engagement with its communities. As defined by the Carnegie Foundation for the Advancement of Teaching, "community engagement describes collaboration between institutions of higher education and their larger communities (local, regional/state, national, [international,] global) for the mutually beneficial exchange of knowledge and resources in a context of partnership and reciprocity."¹ While some faculty engagement may come in the form of public service as such, any of the three categories of faculty activity could entail community engagement, and any could in some way "address critical societal issues and contribute to the public good." Community engagement that is undertaken by faculty to "enhance curriculum, teaching and learning and prepare educated, engaged citizens" may be included and evaluated as part of teaching, and community engagement undertaken to "enrich scholarship, research, and creative activity" may be included and evaluated as part of a research/creative/scholarly faculty assignment.

a. Teaching. The first component in the tenure decision process is an evaluation of effectiveness in teaching or comparable activity appropriate for the unit. As discussed in these guidelines, teaching effectiveness is understood to be fundamentally grounded in demonstrable student learning outcomes. Each candidate must present a record of effectiveness in teaching as specified by the relevant academic unit and reflected in field-appropriate learning outcomes. The record of activities leading to tenure and promotion must provide evidence of excellence in teaching. It is

¹ http://classifications.carnegiefoundation.org/descriptions/community_engagement.php

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therefore vital that substantial and diverse evidence of teaching effectiveness be presented as part of the tenure application.

Effective teaching – to be understood throughout this document as activity that results in learning for those taught – requires a thorough knowledge of the subject; the ability to communicate that knowledge clearly through media appropriate to the subject, discipline, and the needs of students; and the ability to work with, motivate, and serve as a positive role model for students. Teaching performance is best judged by a comprehensive review of the teaching portfolio, and it is essential that the chair, dean, or other appropriate administrator also conduct an appropriate and independent evaluative review.

In addition to course syllabi and student evaluations, a candidate may present the following kinds of documentation of teaching effectiveness: instructional materials (such as case studies, labs, discussion prompts, group projects); assessment activities and products (such as papers, tests, performances, problem sets), and other material used in connection with courses; student performance on pre- and post-instruction measures and other evidence of attainment of learning outcomes; exemplary student work and outcomes; peer observations and evaluations; certifications and other formal evidence of teaching effectiveness; teaching awards; new course development, course redesign, and adaptation to new formats and media through incorporation of emerging technologies; records of advising and mentoring; supervision of teaching and research assistants; thesis direction; and professional development activities and efforts at improvement. Approaches to teaching and concomitant sources of evidence of teaching effectiveness may vary across fields, units, and candidates; consequently, variance in candidate portfolios may also be expected.

Evaluation of teaching must take into consideration an academic unit's instructional mission; the candidate's assigned duties within the unit; class size, scope, and sequence within the curriculum; as well as format of delivery and the types of instructional media utilized. Evaluation of teaching effectiveness should consider the wide range of factors that impact student learning and success. Moreover, effective teaching and its impact on learning can take place in a variety of contexts: in campus classrooms; team teaching; online; in the field; in clinical settings; workshops; panels; through service learning activities, community engagement and internships; in laboratories; within on- and off-campus communities, in organizations, in education abroad settings, such as field schools, and through mentoring of students, including undergraduate and graduate student research. Evaluation of teaching effectiveness in formats and settings outside the classroom should include consideration of the expected impact of student learning on practice, application, and policy.

b. Research/Creative/Scholarly Work. Scholarship takes many forms, including independently conducted research and/or creative works and collaboratively generated contributions to the knowledge base, community improvement or the arts. These activities in various disciplines across the University of South Florida range from research (creation and attainment of new knowledge, whether basic or applied) to creation of artistic products. The purpose of research and creative scholarship is the substantive advancement of a field of inquiry or practice, whether by generation of new knowledge or production of new creative works and technologies. The record of activities leading to tenure and promotion must provide evidence of excellence in one or more of these forms. In order to attain tenure, a faculty member is expected to have

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established an original, coherent and meaningful program of research and/or creative scholarship and to have demonstrated and clearly documented a continuous and progressive record of research and creative scholarship indicative of potential for sustained contribution throughout his or her career.

The peer review process is the best means of judging quality and impact of the candidate's research and creative scholarship. Evaluation at the unit level should include an assessment of the quality of the candidate's work and consider discipline-appropriate evidence of the significance of research and creative activity, as well as the candidate's assignment of duties within unit. A candidate may present the following kinds of documentation of a significant research program: reviews of books and articles; records of competitive honors and awards, grants, and fellowships; criticism and reviews of creative work; reviews of grant applications; citations of the candidate's work; evidence of impact on policy and practice; the quality and significance of journals, series, and presses by which the candidate's work is published or of other venues in which it appears; invited, refereed, or non-refereed status of publications; research awards and acknowledgements; and invitations and commissions. As with teaching portfolios, the kinds of documentation will vary among fields, units, and individuals, and candidates should not be expected to include forms of documentation that are not typical in their disciplines, but they must provide appropriate documentation to support and validate claims about their work. Where appropriate, consideration will be given to external peer recognition, as demonstrated by a record of funded research, and to the demonstrable impact of research through inventions, development and commercialization of intellectual property, and technology transfer, including, but not limited to, disclosures, patents, and licenses. Objective peer review of the candidate's work by scholars/experts external to the University is required. In addition, the candidate's chair or director and dean must conduct independent evaluative reviews.

It is noted that in some areas of scholarship, publications or other products may appear only after lengthy or extensive effort and may appear in a wider range of venues, both of which can be particularly true of community-engaged and/or interdisciplinary work at the local, national and/or international levels. Community-engaged scholarship may be demonstrated by high-profile products such as reports to local, national, or international agencies and formal presentations, or by other products as designated by the unit, as well as by peer review. For collaborative and coauthored scholarship, the evaluation should include consideration of the candidate's role and contribution to the work, consistent with disciplinary and/or interdisciplinary scholarly practice. The body of work of a candidate for tenure must be judged against the appropriate standards within the area of research and creative scholarship, balancing the significance, quality, and impact of the contribution with the quantity of publications and other scholarly products. Recommendations for tenure should present a clear and compelling case for the merit of an application in the context of the kind of scholarship in which the candidate's work has been conducted, leading to high confidence in the candidate's prospects for continuing and meaningful contributions.

c. Service. The third component to be evaluated includes the categories of service to the University, the professional field or discipline, and engagement with the community. Candidates for tenure must have made substantive contributions in one or more of these areas. Evaluation of administrative and other professional services to the University, including service on the USF Faculty Senate and Councils, should go beyond a simple enumeration to include an evaluation of

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the extent and quality of the services rendered. Public service may include work for professional organizations and local, state, federal or international agencies and institutions. It must relate to the basic mission of the University and capitalize on the faculty member's special professional expertise; the normal service activities associated with good citizenship are not usually evaluated as part of the tenure and promotion process. Because of the diverse missions of different units and variations in the extent and character of their interaction with external groups, general standards of public and professional service will vary across units. Evaluation of service will include an examination of the nature and degree of engagement within the University and in the local, regional, national and global communities. Service to the community is differentiated from engagement with communities and external organizations that is undertaken in support of teaching (community-engaged instruction) or of research/creative/scholarly work (community-engaged scholarship).

B. Promotion

1. Evaluation for promotion.

This section applies to ranked faculty, whether tenured or non-tenured. As in the case of tenure, the judgment of readiness for promotion to higher academic rank is based upon a careful evaluation of a candidate's contributions in teaching and student learning (or comparable expectations appropriate to the unit and the candidate's appointment), research/creative/scholarly work, and service. The sections pertinent to evaluation of these factors for the tenure decision apply as well to promotion.

The evaluation refers to written department- and college-level criteria for promotion that have been made available to candidates. Promotion also requires participation as a productive citizen of the University, as this is an integral part of faculty performance and is also evaluated with reference to written criteria.

General standards for consideration of appointment to the ranks of Assistant Professor or Assistant University Librarian, Associate Professor or Associate University Librarian, and Professor or University Librarian (or their equivalents) are as follows. In each category, a candidate's achievements are evaluated in relation to criteria specified by the unit for the rank sought as well as the candidate's assignment of duties and opportunities within the unit.

a. Assistant Professor (or Assistant Librarian)

- i. Promise of continued growth in teaching, librarianship, and other comparable activities appropriate for the unit.
- ii. Promise of independent and/or collaborative research/creative/scholarly work supported by publications or other appropriate evidence.
- iii. Promise of substantive contributions in the area of service and citizenship to the University, profession, and/or public.
- iv. The doctorate or the highest degree appropriate to the field (or, where appropriate, the equivalent based on professional experience consistent with accreditation standards).

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b. Associate Professor (or Associate Librarian)

- i. A record of excellence in teaching, librarianship, or other comparable activities appropriate for the unit, including a record of such activities as participation on thesis and/or dissertation committees and successful direction of the work of master's and doctoral candidates, where applicable.
- ii. A record of excellence in independent and/or collaborative research/creative/scholarly work, supported by substantial, high impact and sustained publications or their equivalent. Categories, criteria, and types of evidence for research/creative/scholarly work may vary across colleges and departments. Thus, original or creative work of a professional nature may be considered as equivalent to publications. Evaluation of applied research should consider potential or actual impact on policies and practices. The record should be sufficient to predict, with a high degree of confidence, continuing productivity in research/creative/scholarly work throughout the individual's career, as defined in the individual's field.
- iii. A record of substantive contribution of service to the University, profession, and/or public.
- iv. For faculty on tenure-track appointments, advancement to the Associate level is made simultaneously with granting of tenure.

c. Professor (or University Librarian)

- i. A record of excellence in teaching, librarianship, or other comparable activity appropriate for the unit, including, where applicable, a record of participation on thesis and/or dissertation committees, and as major professor for undergraduate research/theses and/or master's and doctoral candidates.
- ii. A record of excellence in research/creative/scholarly work of at least national visibility, of demonstrated quality supported by a record of substantial publications or their equivalent. Categories, criteria, and types of evidence for research/creative/scholarly work may vary across colleges and departments. Thus, original or creative work may be considered as equivalent to publications. Evaluation of applied research should consider potential or actual impact on policies and practices. The record should predict continuing high productivity in research/creative/scholarly work throughout the individual's career, as defined in the individual's field.
- iii. A record of substantial contribution of service to the University and to the field, profession or community as appropriate to the mission and goals of the department, the college and/or the University. Expectations about the level of meaningful service contributions for candidates for Professor (or University Librarian) are significantly higher than those that apply to candidates for Associate Professor (or Associate Librarian).
- iv. Compelling evidence of significant achievement among peers in the individual's discipline or professional field at the national or international level. Any recommendation for promotion to the rank of Professor (or University Librarian) must contain evidence of such distinction, as relevant to the unit.

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2. Alternative promotional pathways

Subject to higher-level administrative approval, individual units may establish alternative faculty pathways that are not tenure-earning but that allow for promotion through faculty ranks based on specified criteria appropriate to the unit (e.g. with varying emphasis on research, teaching, practice or performance) and the candidate's assignment of duties. Faculty on these pathways are expected to contribute within any or all of these areas, though in the ways and with distribution of emphasis as specified by the unit.

II. TIMING

A. Probationary period for tenure

Traditionally, candidates for tenure have applied early in the sixth year of full-time employment. However, in consideration of expectations for achievement by faculty in relation to contemporary levels and types of demand on faculty effort, constraints in internal and external resources available to faculty to support scholarly productivity, and a changing national landscape, a college may, with the approval of the institution's designated senior academic officer overseeing the college, choose to define a longer probationary period in order to ensure the University's opportunity to realize the benefit of significant investment in new faculty. Regardless of the length of the probationary period, candidates for tenure will be expected to demonstrate ongoing productivity and progress; expectations of progress within normal time frames will be reflected in established annual and comprehensive review processes, but candidates may apply when ready, as specified in the following section.

B. Timing of applications

Following an initial period in rank, normally at least two years, a candidate for tenure may apply earlier than the last year of the probationary period or, for promotion, earlier than the normal point for advancement in rank, when there is clear evidence that he or she has fully met the applicable criteria and has received endorsement at both department and college levels; additional merit beyond normal criteria for advancement, specified clearly in unit tenure and promotion documents, should not be required.

C. Exceptions to the standard probationary period

1. General exceptions

Ordinarily, a faculty member in a tenure-earning position will either be awarded tenure at the end of the probationary period or be given one-year notice that further employment will not be offered. However, exceptions to the tenure clock may be considered, such as medical exigencies or parental situations covered by FMLA or ADA legislation or other extenuating circumstances approved by the University or as specified in the Collective Bargaining Agreement. A tenure-earning faculty member under such circumstances may request an extension of his or her probationary period. The request must be made in writing and must be approved by the chair of the department, dean, and the institution's designated senior academic officer overseeing the

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candidate's unit. Ordinarily, extensions of more than two years beyond the college's designated probationary period will not be permitted.

2. Exceptions pursuant to University reorganization

The University may establish exceptions to the tenure clock in response to changes in University structure that result in faculty becoming subject to substantial differences in performance expectations.

D. Tenure upon initial appointment

In rare circumstances, tenure may be awarded upon initial appointment. In determining such an award, the guiding principle will be to follow department and college procedures in an expedited process that will not inordinately delay hiring decisions. Specifically, there must be review of tenure eligibility at all levels, with a recommendation forwarded to the institution's designated senior academic officer overseeing the candidate's unit. Approval must be obtained from the senior academic officer prior to making an offer that includes tenure without a probationary period. In support of recommendations for tenure upon initial appointment, the senior academic officer will receive the following information:

- A written statement(s) of review of tenure eligibility at all levels (dean, chair, department faculty); rigorous reviews must occur prior to a request to the senior academic officer to make such an offer;
- The candidate's vita;
- The official starting date for the position, a draft of the letter of offer, which has explicit mention of the tenure offer, pending Board of Trustees approval;
- A compelling statement on the unique achievements of the faculty member that serve as the basis for tenure.

Upon approval, the University President will forward the tenure recommendation to the Board of Trustees for approval at the earliest meeting at which tenure upon appointment is considered.

Persons being considered for administrative appointments accompanied by academic appointments with tenure will interview with the academic unit in which tenure would be considered; and the appropriate dean, the appropriate faculty bodies, and administrators will make recommendations on tenure to the senior academic officer.

III. REVIEWS

A. Review of progress toward tenure

It is the responsibility of the department chair or other appropriate administrator and department peer committee, where constituted, to include a progress toward tenure review as part of the annual evaluation for all faculty in the probationary period for tenure. A more rigorous and extensive pre-tenure review will be conducted at the approximate mid-point of the probationary period. The review will refer to written department- and college-level criteria for tenure that have been made available to candidates. The mid-point review will be conducted by the department's

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tenure and promotion (or appointment, promotion, and tenure) committee, the department chairperson or other appropriate administrator, the college tenure and promotion committee, and the college dean. A summary review of progress toward tenure will be forwarded to the institution's designated senior academic officer overseeing the candidate's unit.

All mid-point reviews shall address the performance of annual assignments including teaching, research/creative/scholarly activity, and service occurring during the preceding tenure-earning years of employment. In addition, all reviews should critically assess overall performance and contributions in light of mid-point expectations. The mid-point review will be based on documentation of performance, including: a current vita; annual evaluations; student/peer evaluation of teaching; selected examples of teaching materials; products of research/scholarship/creative activity; service commitments and accomplishments; and a brief self-evaluation by the faculty member.

The mid-point review is intended to be informative and encouraging to faculty who are making solid progress toward tenure; instructional to faculty who may need to improve in selected areas of performance; or, where progress is significantly lacking and apparently unlikely, bluntly cautionary about the potential for dismissal.

B. Review of progress toward promotion

The annual performance review for a faculty member holding a rank below that of full Professor (or University Librarian) will normally include an evaluation of progress toward promotion. At approximately the mid-point of the typical interval between appointment to the Associate Professor (or Associate Librarian) level and promotion to full Professor (or University Librarian) for faculty in the unit, faculty members will ordinarily be given a more comprehensive review of progress toward promotion, to include participation by the relevant tenure and promotion committees. The candidate may request additional review by a more senior academic officer. A review at this stage is intended to be informative: to be encouraging to faculty who are making solid progress toward promotion, and instructional to faculty who may need to improve in selected areas of performance.

C. External letters for tenure and promotion applications

The department chair ordinarily will include in the tenure and promotion packet a minimum of three letters (but not exceeding six) from external reviewers who are recognized experts in the individual's field or a related scholarly field inside or outside of academe; ideally, these will hold senior tenured appointments within at least aspirational peer institutions. The candidate and the department chair or other appropriate unit administrator will suggest external reviewers, and either may submit a list of reviewers who should be disqualified for professional reasons. The department Tenure and Promotion Committee may also suggest external reviewers. These reviewers should have no significant relationship to the candidate (e.g., major professor or co-author), unless there are mitigating circumstances that would indicate otherwise (e.g., to review scholarship so specialized that few expert reviewers exist). The chair or other appropriate administrator and the candidate will jointly select the reviewers. In the event of disagreement, each party will select one-half the number of qualified reviewers to be utilized. The content of all

Faculty Tenure and Promotion Guidelines

solicited letters that are received from external reviewers should be in the candidate's file prior to the final recommendations by the department Tenure and Promotion Committee.

IV. COMMITTEES

A. Number & type of committees

At the unit level, full-time faculty will determine the role of the unit review committee in developing recommendations for tenure and promotion. Procedures will be specified in unit governance documents.

The number and types of review and, as applicable, voting prior to submission to the senior academic officer will be similar throughout the University and should occur at the following levels or their equivalent: department review committee; department faculty; chair; college review committee; dean.

B. Tenure and promotion committee membership

When establishing a unit Tenure and Promotion Committee, a unit should adhere to the following criteria whenever possible and practical:

1. Membership on committees is limited to faculty who have been appointed within the unit for at least two years;
2. Committees considering candidates for promotion to Professor will comprise individuals holding the rank of Professor. If the unit lacks a sufficient number, the unit head may appoint one or more qualified Professors from other units, in consideration of recommendation by the eligible full-time faculty at the full or associate level in the unit;
3. Only those members who have received tenure at the University of South Florida will be eligible to review and make recommendations on tenure applications;
4. Recommendations for the awarding of tenure are made by the employee's supervisor and include a poll by secret ballot of the unit's eligible tenured members, who are expected to review the application files prior to voting;
5. Non-tenure-track faculty may serve on committees evaluating applications of non-tenure-track faculty at lower ranks;
6. Review of applications from faculty with joint appointments should reflect appropriate participation by the units to which faculty have been appointed. Thus, chairs/deans from secondary units should have proportional input on review and recommendations, and committees reviewing applications from faculty with joint appointments should have equitable representation from respective units based on the distribution of assignment;
7. Chairs, directors and deans should neither vote nor participate on any tenure and promotion committee; this exclusion applies to assistant or associate chairs, directors, or deans when they participate in the tenure and promotion process in support of, or as delegated by chairs, directors or deans;
8. Terms of committee members should be staggered and ordinarily should not exceed three years;

Faculty Tenure and Promotion Guidelines

9. Turnover of committee membership should be encouraged through restrictions on consecutive terms, if feasible;
10. Individuals serving on more than one advisory committee (e.g., department, school, or college) will vote at only one level but may advise on another;
11. In instances where units are geographically distributed, unit procedures should include methods to ensure equitable and appropriate participation by faculty throughout the unit in recommendations for tenure and promotion.
12. All members of tenure and promotion committees are expected to review the application files prior to discussion, or voting. Procedures to ensure participation by all committee members (or, as needed, alternates) in the process are established and followed at all levels of review. Following a vote by secret ballot, the ballots are counted immediately in the presence of committee members, and the tally is recorded. Written narratives from majority and dissenting minorities, if any, may be included with the record.

C. Executive Advisory Committees

In consultation with deans and the Faculty Senate, a senior academic officer responsible for preparing recommendations to the University President regarding tenure and promotion may appoint an Executive Tenure and Promotion Advisory Committee to provide selective review and consultation in preparation of such recommendations. This committee, comprising a broadly representative group of full Professors with acknowledged distinction, will not constitute an additional level of review but will function only as advisory within the existing review process at that level. Terms, scope, and internal working procedures will be determined collaboratively between the committee and the appointing officer.

College, School and Department Tenure and Promotion Guidelines

TIMELINE:

Changes to College T&P guidelines should be completed and submitted to Madeleine Hershberger (813-974-2010, mhershberger@usf.edu) in the Provost's Office no later than **February 28th**, 2020. Expect a 10 day turnaround in an interactive review process. Once the changes have been approved, any changes to Departmental/School documents should be submitted to Madeleine Hershberger (813-974-2010, mhershberger@usf.edu) in the Provost's Office no later than **April 8th**. Note that faculty votes approving all T&P documents need to be carried out prior to the end of the Spring 2020.

The Tenure and Promotion Document must be a stand-alone document that can be easily distributed and updated, should contain the date of its most recent revision, and should document the approval chain. Please do not include T&P guidelines in your Governance Document or in a guide for T&P committees. All T&P guidelines and criteria must be consistent with the Consolidated University T&P guidelines and with the USF UFF Collective Bargaining Agreement (<https://www.usf.edu/hr/documents/employment-resources/employee-labor-relations/uff-collective-bargaining-agreement.pdf>). Criteria used by academic units at USF can be more rigorous and more specific than the University guidelines but not less. Typically, the criteria of a department are more specific than its College, which are more specific than the University.

T&P documents will be revised and approved by the unit faculty, and then approved by the College. They then move to Madeleine Hershberger (813-974-2010, mhershberger@usf.edu) in the Provost's Office to be checked for consistency and alignment with USF policies and the USF UFF Collective Bargaining Agreement (<https://www.usf.edu/hr/documents/employment-resources/employee-labor-relations/uff-collective-bargaining-agreement.pdf>). Finally, they will be sent to the USF UFF leadership. With the explicit approval of UFF they can go into effect July 1, 2020. If not, there is a one year waiting period before they take effect. Faculty with three years of tenure-earning credit at the time the new guidelines take effect will by default use the older guidelines unless they notify their unit in writing, 30 days prior to the beginning of the tenure consideration that they would prefer to use the new guidelines.

Tenured faculty and instructors will retain their current status. Tenure-earning faculty will retain that status (consistent with ongoing evaluation procedures) and will be considered for tenure in their appointed department, school, and/or college. Tenure-earning faculty, initially hired at USF St. Petersburg and USF Sarasota-Manatee with three years of tenure-earning credit on July 1, 2019 (i.e. generally those hired in Fall 2016 or earlier), will be considered for tenure consistent with local (i.e. USF St. Petersburg or USF Sarasota-Manatee) department, school, college, and institutional guidelines in place prior to consolidation. All other tenure-earning faculty members will be evaluated for tenure and promotion following USF's Guidelines (including those yet to be developed by academic departments, schools and colleges), effective July 1, 2020.

Before you begin to revise your documents, please carefully review the new consolidated USF T&P guidelines that will go into effect on July 1, 2020. You will also need to review the older USF Tampa guidelines and those that pertain to branch campus faculty (links listed on following page) with three years of tenure-earning credit on July 1, 2019 (generally those hired Fall 2016 or earlier). Please review the USF UFF Collective Bargaining Agreement (<https://www.usf.edu/hr/documents/employment-resources/employee-labor-relations/uff-collective-bargaining-agreement.pdf>), especially Articles 14 and 15.

College, School and Department Tenure and Promotion Guidelines

PreConsolidation Handbook Links:

USF Tampa PreConsolidation T&P Guidelines:

<https://www.usf.edu/provost/documents/historical-documents/usf-tampa-preconsolidation-tp-guidelines.pdf>

USF St. Petersburg PreConsolidation T&P Guidelines (if hired before Fall 2018):

<https://www.usf.edu/provost/documents/historical-documents/usfsp-preconsolidation-tp-guidelines-1998-option-if-hired-before-fall-2018.pdf>

USF St. Petersburg PreConsolidation T&P Guidelines (If hired Fall 2018 or after):

<https://www.usf.edu/provost/documents/historical-documents/usfsp-preconsolidation-tp-guidelines-2016-hired-effective-fall-2018.pdf>

USF Sarasota-Manatee PreConsolidation T&P Guidelines:

<https://www.usf.edu/provost/documents/historical-documents/usfsm-preconsolidation-tp-guidelines.pdf>

Three circumstances will define how much revision is necessary:

1. Departments/Schools that will continue solely on a single campus in a College that will also continue solely on a single campus. These units will need to make minimal changes to their T&P documents.
2. Departments/Schools that will continue on a single campus but belong to a College with a multi-campus presence. These units will need to accommodate any changes in their College T&P documents associated with a multi-campus presence.
3. Departments/Schools with a multi-campus presence will likely need to modify their T&P documents extensively to accommodate and include faculty from other campuses into their T&P processes.

The main difference between the current USFT T&P guidelines and those at the branch campuses is straightforward. Prior to 2014, tenure and promotion at all USF campuses was considered using the same evaluative measures as are used in annual evaluation (outstanding, strong, satisfactory, weak, and unacceptable). It was expected that for tenure, a candidate would be Outstanding in either Teaching or Research (more commonly Research) and Strong in the other, and a full professor candidate should be Outstanding in both Research and Teaching. In an effort to consider tenure and promotion decisions differently than annual evaluations, USFT adopted a new measure in the 2014 University T&P guidelines where the criteria for tenure and promotion is “Excellence in scholarly and academic achievement” and the evaluators are asked to answer either yes or no that the applicant has met T&P criteria. This concept was not adopted at the regional campuses until the new, consolidated USF guidelines effective July 1, 2020 were set through a process involving all three Faculty Senates and the System Faculty Council.

Faculty at the regional institutions were concerned that they may have fewer resources available regarding research than faculty at USFT, while their teaching assignments have generally been higher. Assignment must be considered in T&P as mentioned in the 2014 USF T&P document and in the USF UFF Collective Bargaining Agreement (<https://www.usf.edu/hr/documents/employment-resources/employee-labor-relations/uff-collective-bargaining-agreement.pdf>). Equitability is emphasized in the new consolidated USF T&P guidelines effective July 1, 2020.

College, School and Department Tenure and Promotion Guidelines

For example the statement “Careful consideration must also be given both to the equitability of the candidate’s assignment and opportunities in relation to others in the department/unit” is found in section (2) of the new consolidated guidelines. T&P committees and administrative evaluators will need to be especially careful to consider inequitable past assignments during tenure evaluation, especially in the first few years post-consolidation. Chairs, Directors and Deans will need to correct inequitable assignments and opportunities in their consolidated units as quickly as possible.

Faculty and administrators at USFT are accustomed to different T&P documents at the University, College, School and Department level, but this has not generally been the case at USFSP and USFSM. It will be helpful to know that most faculty at USFSP and USFSM are in colleges rather than departments. Along with concern about equitable past assignments, changing the criteria for T&P to “Excellence” in addition to having department specific T&P requirements may invoke more change and more concerns for faculty at the branch campuses compared to those in Tampa in the immediate wake of consolidation.

Mid-tenure review will proceed as usual in the consolidated university according to the revised T&P documents moving forward. However, the administration at the regional campuses were advised to have faculty going up for mid-tenure review in 2019/20 to have their materials reviewed both at their regional campus and by their expected post-consolidation home department in order to provide a broader perspective to the candidate.

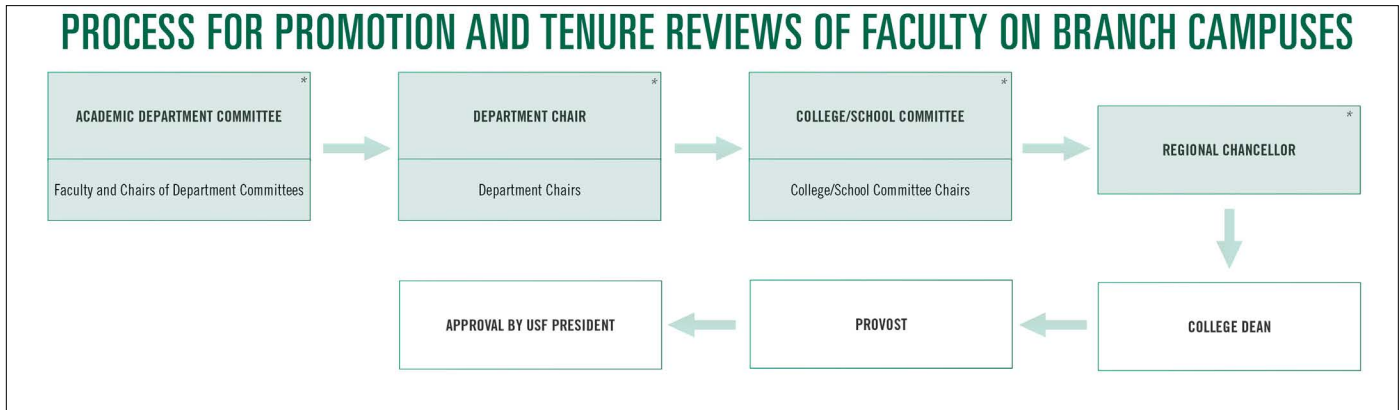
Faculty at USFSP and USFSM with three years of tenure-earning credit on July 1, 2019 (generally those hired in Fall 2016 or earlier) will be considered for tenure under their old regional campus guidelines unless they elect to use the new consolidated guidelines in writing 30 days prior to the beginning of tenure consideration. This is required in Article 15.4.B of the USF UFF Collective Bargaining Agreement (<https://www.usf.edu/hr/documents/employment-resources/employee-labor-relations/uff-collective-bargaining-agreement.pdf>). If a candidate chooses to use the older regional guidelines, their new consolidated academic unit’s T&P committee and administration will still be responsible to carry out the process.

Tenure and Promotion Committee membership is addressed in Section IV of the consolidated USF T&P guidelines and the specifics should be part of every unit’s process. One important principle is that any one person may only participate in a candidate’s T&P process once. Given the nature of consolidation, it will be important the T&P process be designed to provide equitable and appropriate participation by faculty throughout a geographically distributed unit. Note that for faculty at branch campuses going up for tenure or promotion, the appropriate Regional Chancellor will have the opportunity to add her/his input to their T&P recommendation prior to it going to the College Dean.

Tenure & Promotion for most Academic Affairs faculty will be carried out using the Archivum Faculty Information System (FIS) in most cases. Faculty and administrators involved in T&P should visit <https://usflearn.instructure.com/enroll/GGFXX4> for information and training related to the FIS. Please be aware that the FIS will accommodate input by campus chairs and campus deans, but the sign-off for the decision will be made by the department chairs and college deans. Branch campus faculty going up for tenure under the old regional guidelines will need to use the old paper system since the tenure criteria used in the regional T&P documents (e.g. Outstanding, Strong, Fair and Poor) are not supported in FIS which only recognizes Excellence and simply asks if the candidate meets or does not meet the criteria. USF Health is working toward using FIS for T&P and will transition soon.

College, School and Department Tenure and Promotion Guidelines

All tenure and promotion reviews are initiated in a faculty member's academic department, flow through the department committee, Department Chair, through a school committee/Director (where appropriate), and college committee, to the RC (with support from the regional vice chancellor, or associate vice chancellor, for academic affairs), then to the College Dean for recommendation to the Provost. Promotion and tenure cases for faculty members on branch campuses will include a formal review by the RC prior to a College Dean completing and forwarding a recommendation to the Provost.



Faculty Searches and Hiring on Regional Campuses

Regional Chancellors will have responsibility and accountability for assessing, with fully informed justifications, future faculty hiring needs at branch campuses. Faculty hiring plans are developed in joint collaboration with campus and College Deans, and presented to the Provost for consideration of approval, funding and implementation.

The recruitment and hiring of faculty will be conducted by the university-wide unit (i.e. department/school/college etc.) within which the faculty member will be appointed. College Deans and the Provost's Office will delegate hiring responsibilities on branch campuses to chairs, directors, campus assistant/associate deans, or campus deans at any of USF's campuses. Unit-wide search committees for faculty on regional campuses will include faculty and the Regional Chancellor or designee who will serve as a voting member on all search committees for faculty hiring on branch campuses. Faculty appointments are approved by the College Dean and Provost. If consensus is not reached, the Provost will adjudicate.

Faculty Classification and Appointments

This document describes new faculty titles and corresponding job codes that are proposed to be implemented prior to consolidation on July 1, 2020. These changes are recommended in response to several faculty committees' suggestions for changes or additions in job titles (particularly regarding the title of Instructor) and to bring the university's contemporary hiring practices in line with the job titles/codes now shown in Appendix A of the USF-UFF Collective Bargaining Agreement (see pp 60-61).

PROPOSED CHANGES TO FACULTY TITLES AND JOB CODES

The changes described in the following sections will require further vetting and negotiation. In particular, they will require negotiation with the United Faculty of Florida in order to modify the Appendix A referenced above. Where denoted below, specific new code numbers will be determined by Human Resources. None of the proposed changes will alter the USF-UFF Collective Bargaining Agreement regarding the in-unit status of any faculty members.

TENURE-TRACK POSITIONS (PRESENT JOB CODES IN PARENTHESIS; NOTES INCLUDED)

Professor (9001) – no change

Associate Professor (9002) – no change

Assistant Professor (9003) – no change

Distinguished University Professor (9007) – formal job title does not currently exist

NOTE: This code, but not title, exists at present. Currently, DUPs are coded across several job titles. All individuals who have been named as a DUP will be consolidated into this code and title. DUP is taken here to mean a title bestowed as a result of a University wide (not College) process.

Eminent Scholar (9009)

NOTE: The current job description specifies that a person holding this position must occupy an endowed chair established within the university. Because it has not been used in that manner, this code/title will be retired, but those currently coded as such will remain in this category.

Non-tenure track positions that are new to Appendix A of the USF-UFF CBA and will require new job codes

Lecturer

Senior Lecturer

Master Lecturer

NOTE: This classification will replace the existing titles of Instructor I, Instructor II, and Instructor III. Although titles vary widely, the title Lecturer is the most commonly used designation for non-tenure track teaching-focused faculty at Research I institutions. Each level will have a unique code.

Assistant Professor of Practice

Associate Professor of Practice

Professor of Practice

NOTE: This title has been advocated as useful to some Colleges, especially for specialized accreditation purposes.

Faculty Classification and Appointments

The positions are non-tenure track, but requires a terminal degree in the field, and must have an assignment commensurate with the needs of the department/school. The faculty member's overall assignment should have relevance to practice, and allow the faculty member to maintain and enhance scholarly academic qualifications for accreditation purposes. This code/title will also apply to those whose function includes activity in a clinical setting, particularly those for which medical licensure is required. Increased levels of significance and impact of the person's work will be assessed for progression through career ranks.

Assistant Research Professor

Associate Research Professor

Research Professor

NOTE: These titles exist and are widely used. Individuals occupying these positions are job coded the same as tenure-track ranked faculty in GEMS, but with a "modifier" in a separate column. The recommendation is to retain the title but distinguish these positions from tenure-track categories by assigning each level a unique job code.

TITLES AND JOB CODES IN APPENDIX A OF THE USF-UFF CBA THAT WILL BE ELIMINATED/CHANGED

Instructor (9004; as discussed earlier)

Graduate Research Professor (9006; all individuals currently holding this position are currently Distinguished University Professors; they will be converted to job code 9007)

Distinguished Service Professor (9007; all in this category are Distinguished University Professors; the title will change to reflect that, but 9007 will be retained for this purpose)

Eminent Scholar (9009; as discussed above, this code/title will be discontinued, but those currently coded in this manner will be retained in this category)

University School Professor (9016)*

University School Associate Professor (9017)*

University School Assistant Professor (9018)*

Instructor Librarian (9056)*

Staff Physicist (9153)*

Counselor/Advisor (9173)*

Instructional Specialist (9178)*

Specialist, Computer Research (9334)*

Coordinator, Cooperative Education (9394)*

Specialist, Music (9433)*

Faculty Classification and Appointments

Resident Advisor to Students (9435)*

Psychiatrist (9460)*

Physician (9462)*

Physician's Assistant (9464)*

Dentist (9490)*

Specialist, Student Counseling (9495)*

*Currently, there are no faculty members in these positions.

TITLE AND JOB CODES IN APPENDIX A OF THE USF-UFF CBA THAT WILL NOT CHANGE

Professor (9001)

Associate Professor (9002)

Assistant Professor (9003)

University Librarian (9053)

Associate University Librarian (9054)

Assistant University Librarian (9055)

Coordinator (9115)

Associate In (9120)

Assistant In (9121)

Program Director (9126)

Curator (9150)

Associate Curator (9151)

Assistant Curator (9152)

Scholar/Scientist/Engineer (9160)

Associate Scholar/Scientist/Engineer (9161)

Assistant Scholar/Scientist/Engineer (9162)

Research Associate (9166)

Psychologist (9434)

Faculty Classification and Appointments

JOINT APPOINTMENTS

Typically, this designation is taken to indicate an arrangement whereby a faculty member holds appointments in two (infrequently, or more) academic units, with each unit contributing financial support to a proportion of the faculty member's full-time equivalent (FTE) effort. A best practice is to have one unit recognized as the primary department, with memorandums of understanding developed among the participating units that clearly and concretely specify teaching, research, and service expectations for the individual from all units involved.

NOTE: USF Health has a much broader usage of the term, and it may include positions across units in which only one unit supplies funding for the position. Further discussion will include whether to strive for a more standardized usage.

NEW CODES FOR CLASSIFYING ADJUNCTS (EACH WILL HAVE A UNIQUE CODE)

Adjunct, In-Unit (for CBA purposes when a contract is negotiated between the university and the adjunct union)

Adjunct, Out-of-Unit (for individuals appointed as adjuncts but who are excluded from in-unit status for purposes of the adjunct union CBA)

Adjunct, USF Health (a separate code recognizes the broad application of this category by USF Health to arrangements with individuals employed in non-USF capacities but have USF-related privileges)

VISITING FACULTY

A title modifier of **Visiting** should be used for faculty hired on a one-year appointment. They may be hired initially without a search, but subsequent hiring of the same person will require a search (i.e., no subsequent appointments of the person without a search). The "Visiting" modifier should be used in conjunction with a title that is commensurate with the overall academic credentials of the individual (e.g., to be titled as a Visiting Assistant Professor, persons should have credentials that would have otherwise made them eligible for appointment on a tenure-track line at that rank). A visiting faculty member hired with a search may be retained for three years with a fourth year allowable with permission from the Provost's Office.

USE OF COURTESY VS. AFFILIATE FACULTY

Nationally, the modal usage of these terms is distinguished by **Affiliate** faculty representing appointments to a department by an individual who holds another appointment at the university. It is typically not a paid position, though some non-recurring compensation may be provided for specific services rendered. In contrast, **Courtesy** faculty do not hold a primary position of employment at the university, but provide service or connections that are of benefit to the unit in which the appointment is held. The services delivered may or may not be compensated. Accreditation requirements apply to both Affiliate and Courtesy faculty members who provide instructional services within the university.

When appointing individuals as Courtesy faculty, ranked titles may be assigned, but they should be commensurate with expectations of the university associated with the academic credentials of a faculty member at that rank.

Faculty Classification and Appointments

NOTE: The title of Affiliated Faculty is used more broadly by USF Health to capture the appointment of individuals who do not have formal faculty positions at USF, but do have practice privileges associated with USF Health partnerships.

APPENDIX A OF THE USF-UFF CBA POSITION CLASSIFICATIONS IN THE BARGAINING UNIT

All employees in the following position classifications holding regular, visiting, provisional, research, affiliate, or joint appointments are included in the bargaining unit:

9001 - Professor

9002 - Associate Professor

9003 - Assistant Professor

9004 - Instructor

9005 - Lecturer

9006 - Graduate Research Professor

9007 - Distinguished Service Professor

9009 - Eminent Scholar

9016 - University School Professor

9017 - University School Associate Professor

9018 - University School Assistant Professor

9019 - University School Instructor

9053 - University Librarian

9054 - Associate University Librarian

9055 - Assistant University Librarian

9056 - Instructor Librarian

9115 - Coordinator

9120 - Associate in _____

9121 - Assistant in _____

9126 - Program Director

9150 - Curator

9151 - Associate Curator

Faculty Classification and Appointments

9152 - Assistant Curator

9153 - Staff Physicist

9160 - Scholar/Scientist/Engineer

9161 - Associate Scholar/Scientist/Engineer

9162 - Assistant Scholar/Scientist/Engineer

9166 - Research Associate

9173 - Counselor/Advisor

9178 - Instructional Specialist

9334 - Specialist, Computer Research

9394 - Coordinator, Cooperative Education

9419 - Coordinator, Research Information

9433 - Specialist, Music

9434 - Psychologist

9435 - Resident Advisor to Students

9460 - Psychiatrist

9462 - Physician

9464 - Physician's Assistant

9490 - Dentist

9495 - Specialist, Student Counseling

Together with chairpersons (Administrative Code: C1) in the College of Arts and Sciences and College of Education and employees in the above classifications with the following administrative titles: Associate Chair (C2), Assistant Chair (C3), Coordinator (N1), Program Director (G1), Associate Program Director (G2), Assistant Program Director (G3), Department Head (H1), Associate Department Head (H2), Assistant Department Head (H3), and Counselor/Advisor (B1).

The following employees are excluded from the bargaining unit: All employees of the USF College of Medicine and all other employees of the University of South Florida, including but not limited to all employees serving as trustees of the University of South Florida and all employees who are in administrative classifications not specifically included above, or are managerial or confidential employees.

Faculty Classification and Appointments

Process for determining the default academic home of consolidated USF faculty.

College Deans should prepare rosters of their consolidated faculty due to Rosie Lopez (813-974-2267, rlopez@usf.edu) in the Provost's Office by **February 14th, 2020**. Please use the Excel Faculty Roster template that follows this section. College deans will need to confer with current regional administrators and may need to confer with other College Deans if there is uncertainty or ambiguity concerning a faculty member's potential default home, especially for interdisciplinary or multidisciplinary faculty. Faculty should not be on more than one College Deans' Roster unless there is an agreement between the two College Deans for a joint appointment, with an MOU in place and each College bearing part of the salary commitment for that faculty member. Prior to submitting their rosters to the Provost's Office, The following criteria should be used to determine the default home of a faculty member:

1. Current (pre-consolidation) appointment
2. Current and recent assignments
3. Current (pre-consolidation) unit
4. Terminal Degree
5. Current and recent teaching and scholarship activity
6. Consultation with other Deans for some multidisciplinary faculty

Faculty must be notified as soon as possible, but no later than **February 15th**, of their post-consolidation default home unit. Some faculty may wish to apply to join a different (preferred) home unit via the process below.

EXCEL FACULTY ROSTER SAMPLE ([BIT.LY/USF-COLLEGE-ROSTER](https://bit.ly/usf-college-roster))

Post Consolidation College Rosters								
College:			Arts and Sciences					
Track								
Last Name	First Name	Rank	pre-consolidation campus	pre-consolidation unit	Discipline	Post consolidation unit	Post consolidation campus	Comments
Clifford	Steve	Assoc Prof	USFSP	Arts & Sciences	Marine Biology	Integrative Biology	USFSP	Joint appointment with Marine Sciences 60% CAS;40% Marine Sciences
Dunkin	Donut	Professor	USFSP	Arts & Sciences	Anthropology	Anthropology	USFSP	

Post Consolidation College Rosters								
College:			Arts and Sciences					
Instructors/Lecturer								
Last Name	First Name	Rank	pre-consolidation campus	pre-consolidation unit	Discipline	Post consolidation unit	Post consolidation campus	Comments
Fields	Sally	Instructor II	USFSM	Economics	macroeconomics	Economics	USFSM	would like to move to Muma

A Statement of Clarification on Faculty Appointment within the Consolidated USF

January 23, 2020

Beginning July 1, 2020, all USF faculty members will hold (a) a primary academic appointment in one of USF's 13 colleges, and (b) a campus appointment (at Sarasota-Manatee, St. Petersburg, or Tampa).

College appointments:

Most USF faculty members will maintain their academic appointment in their current college whether or not it continues as a single-campus college or becomes a multi-campus college (with students, faculty and programs at more than one USF campus) with consolidation. Understanding college appointments is essential to a faculty member's academic identity and affiliation, and to building robust scholarly communities within USF's academic colleges while transcending geographical location.

In some cases, a faculty member's academic discipline and/or department will be found in a different college following consolidation. In such cases, the college to which a faculty member is appointed will be expected to change.

In a limited number of cases, faculty members may request (on a one-time basis) a change in college appointment with consolidation (outside of that defined by discipline and/department). The process, timeline and forms for such requests are presented on pages 29-32 of Section 1 in the USF Consolidation Academic and Student Success Implementation Handbook, Volume 2.

Please note: Joint appointments (i.e. where a faculty member holds appointments in two (infrequently, or more) academic units, with each unit ordinarily contributing financial support to a proportion of the faculty member's full-time equivalent (FTE) effort) are addressed on page 25 in Section 1 of the USF Consolidation Academic and Student Success Implementation Handbook, Volume 2.

College deans have been asked to prepare rosters of their consolidated faculty members (in their college and across all campuses) no later than February 14, 2020.

Campus appointments:

Currently, faculty members are appointed at a single USF campus. This represents the geographical location and budget entity responsible for providing employee support services, and payroll. Understanding campus appointments is essential to building a local, campus-based, community of scholars across college boundaries.

A faculty member's campus appointment is not expected to change with consolidation. Please note: while the USF-UFF Collective Bargaining Agreement contemplates changes in the principal place of employment (see page 32 of Section 1 in the USF Consolidation Academic and Student Success Implementation Handbook, Volume 2), none are anticipated in the near term or prior to operating as one university beginning July 1, 2020.

A Statement of Clarification on Faculty Appointment within the Consolidated USF

Cross Campus, College, School and/or Department assignments:

Notwithstanding a clearly defined college and campus appointment, balancing faculty assignment (instructional, research, and service) to best meet the needs of USF students and faculty, along with the communities we serve, may occasionally necessitate assignment beyond a faculty member's appointed college and/or campus. Faculty assignment is addressed on pages 32-39 of Section 1 in the USF Consolidation Academic and Student Success Implementation Handbook, Volume 2.

Faculty Classification and Appointments

Post Consolidation College Rosters								
College:			Arts and Sciences					
Non-Tenure Ranked Faculty								
Last Name	First Name	Rank	pre-consolidation campus	pre-consolidation unit	Discipline	Post consolidation unit	Post consolidation campus	Comments
Dodge	Cindy	Research Assist. Prof.	USFSP	Arts & Sciences	Chemistry	Chemistry	USFSP	grant funded

PROCESS FOR CHANGING THE HOME ACADEMIC UNIT OF FACULTY.

Most faculty and their supervisors will have a clear understanding of their post-consolidation academic home unit. A limited number of faculty members may request, on a one-time basis (during a window of time beginning **February 17, 2020 to April 3, 2020**), an appointment to a preferred department, school, and/or college based upon academic credentials, teaching and scholarship, and the needs of the university. This will most likely involve multi- or interdisciplinary faculty members whose credentials, teaching, and research interests demonstrably fit better in a different academic unit than the default unit. The process begins with the faculty member approaching the chairs or unit administrators of both their default and preferred home academic units. The university retains the right to approve the request (or not), taking into account the following considerations:

1. The fit of the appointment to the requested unit
2. The impact on both the default and preferred units
3. Approval of the transfer by faculty in the preferred unit
4. Approvals by upper administration of the default and preferred units
5. Agreement between units regarding any financial considerations.

Faculty Classification and Appointments

APPLICATION TO CHANGE HOME ACADEMIC UNIT FORM SAMPLE ([BIT.LY/USF-CHANGE-FORM](https://bit.ly/usf-change-form))



Application to Change Home Academic Unit ***This is a one time only opportunity (February 7 - April 3, 2020)***

This form is used for a faculty member to request a move from their default academic home as determined by the College Dean to a different (preferred) academic home. ***Please complete the form and attach a current CV.***

The form should be approved/signed in the following order: 1. Default unit Chair/Director, 2. Default College Dean, 3. Preferred unit Chair/Director, 4. Preferred College Dean. There is a two page limit not including the CV.

Name _____

Academic title and rank _____

Pre-consolidation unit _____

Assigned default academic unit _____

Preferred academic unit _____

Briefly address what you believe to be the positive impact of joining the new (preferred) unit:

Provide information regarding how your credentials/scholarship/teaching better fits into the preferred unit:

Faculty Classification and Appointments

APPLICATION TO CHANGE HOME ACADEMIC UNIT FORM SAMPLE (BIT.LY/USF-CHANGE-FORM)



Provide evidence that you have the support of the Dean/Director/Chair of your default unit and your preferred unit to make the change.

Default Unit Chair/Director

Name _____ Title _____

Approve? Yes No Signature _____

Default College Dean

Name _____ Title _____

Approve? Yes No Signature _____

Preferred Unit Chair/Director

Name _____ Title _____

Approve? Yes No Signature _____

Preferred College Dean

Name _____ Title _____

Approve? Yes No Signature _____

Faculty Assignments

The process will be for the faculty member to file a two page (maximum) summary of the request (please see the sample *Application to Change Home Academic Unit* form following this section) including the following:

1. Name, faculty rank, pre-consolidation unit to which you belong and contact information.
2. The default unit to which you have been assigned.
3. The unit you would prefer to join.
4. Briefly address what you believe to be the positive impact of joining the new unit.
5. Provide information regarding how your credentials/scholarship/teaching better fits into the preferred unit. Include an updated CV with the request.
6. Provide evidence that you have the support of the Dean/Director/Chair of your default unit and your preferred unit to make the change.

The default chair, the default College Dean, the preferred chair and the preferred College Dean should sign the application prior to sending it to Rosie Lopez (813-974-2267, rlopez@usf.edu) in the Provost's Office. Each case will be analyzed, the relevant administrators will be consulted, and a final decision made.

PROCESS FOR CHANGING THE HOME CAMPUS OF FACULTY

A faculty member maintains a principal place of employment, which would be their pre-consolidation campus. The principal place of employment is described in Article 9.5 of the USF UFF Collective Bargaining Agreement (<https://www.usf.edu/hr/documents/employment-resources/employee-labor-relations/uff-collective-bargaining-agreement.pdf>).

1. If the administration desires to move a faculty member to a different principal place of employment they must provide at least 9 months notice and the faculty member may request a conference with their supervisor to express any concerns. Voluntary changes shall be considered prior to involuntary changes if practicable.
2. If a faculty member desires to move to a different principal place of employment, they would need to consult with their College Dean. Their College Dean is under no obligation to grant a change, but may do so at their discretion.

PROCESS FOR CROSS CAMPUS/COLLEGE/DEPARTMENT ASSIGNMENT OF FACULTY

The USF UFF Collective Bargaining Agreement (<https://www.usf.edu/hr/documents/employment-resources/employee-labor-relations/uff-collective-bargaining-agreement.pdf>) (Article 9.5.B) defines a secondary place of employment where a faculty member in one location is assigned to responsibilities at another location at least fifteen miles from their principal place of employment. Faculty should be given at least 90 days written notice of the assignment to the secondary location, and request a conference to express concerns. If the secondary assignment is made within a regular full-time appointment (e.g. they need to travel from their principle to secondary place of employment as part of their work day) their assignment should be adjusted in recognition of the time spent traveling and reimburse any necessary



Faculty Assignments

travel expenses at State rates.

Assigning faculty to more than one academic unit that does not require travel can be made at the discretion and agreement of the Dean, Director or Chair of the two academic units. This is particularly suited for Instructor/Lecturers and tenured faculty. However, if the faculty member is an untenured assistant professor, there should be thorough consideration as to how the split assignment might affect their future tenure application.

PROCESS FOR MOVING FROM A TENURE TRACK ASSISTANT PROFESSOR POSITION TO A LECTURER POSITION

As USF moves into consolidation, there may be some untenured assistant professors who are concerned enough about tenure that they may request to be moved into an untenured Lecturer position or their unit administrator may be similarly concerned. In such cases, there should be a consultation between the faculty member and unit administrator. If both the faculty member and the unit administrator agree, they should contact the Vice Provost for Academic Labor Relations who can help facilitate the process. Note that this is not an option if the faculty member has already been denied tenure.

FACULTY ASSIGNMENT PROCESS

Beginning spring 2020, assignments are delivered to the faculty in writing through the Faculty Information System (FIS). The Chair/Director of the academic unit bears the primary responsibility to make assignments and should visit <https://usflearn.instructure.com/enroll/GGFXXK4> for information related to the FIS. Article 9 of the USF UFF Collective Bargaining Agreement (<https://www.usf.edu/hr/documents/employment-resources/employee-labor-relations/uff-collective-bargaining-agreement.pdf>) pertains to assignments. See the "Faculty Assignment in Detail" section for a more thorough review of faculty assignment principles, categories, processes and effort reporting. Faculty assignments for the new academic year need to be made at least six weeks prior to the beginning of the academic year and there must be a process in place to allow consultation and discussion between the chair and the faculty member. This process is normally carried out in the spring semester prior to the new academic year. The FIS has built in provisions to ensure that proper notification and consultation occurs. The USF UFF Collective Bargaining Agreement (<https://www.usf.edu/hr/documents/employment-resources/employee-labor-relations/uff-collective-bargaining-agreement.pdf>) (Appendix F) allows a formal process to dispute an assignment.

Categories of assignment include:

Teaching – teaching formal courses, course development, class preparation, grading, and mentoring graduate and undergraduate researchers.

Research – funded (sponsored) or unfunded (departmental) research or other scholarly and creative activities.

Service – activities that promote the university, profession, or community outside of teaching and research.

Administration – supervising other faculty, staff or students.

Clinical – pertaining to faculty with clinical job duties that require a medically related licensure.

Faculty Assignments

Other – used for professional leave and release time for UFF activities.

The Relationship between Assignment and Effort Reporting. Assignment is a predicted estimate of what a faculty member's assignment will look like in the upcoming academic year. The AFD-FAR system is used to report details on what those activities were after the academic year ends. So the assignment in FIS estimates what activities a faculty member is expected to carry out prior to the academic year while the AFD-FAR reports what the faculty member actually did during that academic year. For the time being the AFD-FAR system in FAIR will continue to be used. Effort percentages for externally funded federal research reported to the State and to the Federal government as a part of USF's PERT process must be equivalent.

Equitable Assignment. Within an academic unit, care should be taken to have equitable assignments across the faculty regardless of the geographic location of the faculty member. Branch faculty teaching loads may need to be reduced for equitability purposes, Chairs and Directors of multi-campus units should take a holistic approach in how teaching needs are distributed across their existing faculty to minimize the need for additional hires. Note that assignment parameters are being standardized to some extent across all academic units of the university (see below).

Tenured and Tenure Track assignment. Most tenure line faculty are assigned in three areas: Teaching, Research and Service. Assignment is carried out in the Faculty Information System. Each of these have subcategories that provide extra nuance required for USF reporting to BOT, BOG and federal entities. Note that as a comprehensive research university, academic units should move toward having the majority (e.g. >50%) of their research active assignment in research, and move toward a service assignment of 5% -10% so that service assignments greater than 10% would be assigned only under special circumstances. If tenured faculty have become inactive in research activity, they can be given a higher teaching assignment with a concomitant decrease in research assignment. By state mandate, the maximum assignment per course is 25% (8.133% assignment per credit hour maximum) although a chair can assign less. For example teaching a course of 200 students could result in a 25% assignment while teaching a smaller course of 19 students might result in an assignment less than 25%. Factors to consider include class size, class level, required vs. elective course, number and variation of course preparations, distance learning etc. Please see "Faculty Assignment Detail" at the end of this section.

Research assignments are subdivided into funded research, departmental research and creative activities. To be classified as funded research, the faculty member's salary for that percentage of assignment must be derived from a C&G funding source. For example, if a faculty member has a 50% research assignment, and if 10% of his/her salary is C&G derived, the assignment would be subdivided into funded research (10%) and departmental research (40%). If a faculty member is C&G funded but none of the C&G funds are used to pay their salary, that research is classified as departmental research. Creative activities are most often departmentally funded.

Lecturer Assignment. In most cases, Lecturers should teach a 4/4 teaching load, typically with 95% teaching and 5% service. Lecturers should not normally have research assignments.

Adjunct Assignment. Adjuncts are hired on a part-time basis to teach specific courses on a semester by semester contract. They should not have research or service assignments. The average teaching load for an adjunct at USF is approximately 2 courses per semester. Adjunct assignments are made in an employee contract that outlines the assignment at the time of appointment.

Faculty Assignments

FACULTY ASSIGNMENT IN DETAIL

Purpose: All faculty members (9-month and 12-month) are generally required to have written annual assignments within 6 weeks of the start of the new academic year. The purpose of this document is to provide individuals responsible for faculty assignments, typically a Chair/Director or Dean, with information and guidance for making annual assignments for tenured/tenure-track, instructional, research, and clinical faculty members who hold regular, visiting, or joint appointments. It is not applicable to assignments for those on adjunct and courtesy appointments, who are typically provided with a letter of agreement or employee contract that outlines assignment at the time of appointment.

Part 1. Relevant Documents:

- **Florida Statutes 1012.945 Required number of classroom teaching hours for university faculty members.** – (aka “The 12-Hour Rule) <http://www.flsenate.gov/Laws/Statutes/2019/1012.945>
- **University of South Florida/United Faculty of Florida Collective Bargaining Agreement (2016-2019)** – Article 9 Assignment of Responsibilities <https://www.usf.edu/hr/documents/employment-resources/employee-labor-relations/uff-collective-bargaining-agreement.pdf>
- **USF Regulations**

Number	Title	URL
10.014	Benefits and Hours of Work (Faculty)	http://regulationspolicies.usf.edu/regulations/pdfs/regulation-usf10.104.pdf
10.018	Evaluation (Faculty)	http://regulationspolicies.usf.edu/regulations/pdfs/regulation-usf10.108.pdf
10.016	Promotion and Change in Assignment (Faculty)	http://regulationspolicies.usf.edu/regulations/pdfs/regulation-usf10.106.pdf

Part 2. Guiding Principles:

The professional responsibilities of faculty members comprise both scheduled and nonscheduled activitiesⁱ. Florida Statutes 1012.945, also known as the “12-hour Law”, requires that each full-time equivalent faculty member who is funded by state funds teach a minimum of 12 classroom contact hours per week (or 100% of effort) or equivalent assignments each term in furtherance of the mission of the university. Effective July 1, 2020, with consolidation of SACSCOC accreditation, faculty assignments on all campuses will be in furtherance of USF’s mission as a Florida Preeminentⁱⁱ and Carnegie classified Highest Research Activity (R1) Universityⁱⁱⁱ.

The annual evaluation of faculty and the evaluations for promotion and tenure are based on assigned duties^{iv}. Faculty assignments must provide equitable opportunities (in relation to other faculty in the same department/school and college) to meet the required Department/School, College and University standards for annual evaluations and for tenure and/or promotion.

Supervisors responsible for make the assignments will ensure that the assignment:

- Aligns with USF’s mission as research intensive, preeminent, R1 university;
- Provides fair and equitable opportunities to applicable faculty members to progress toward meeting the criteria and standards for promotion and tenure;

Faculty Assignments

- Is consistent with the faculty member’s qualifications; experience, including professional growth and development; and preferences, to the extent practicable;
- Provides fair and equitable opportunities to fulfill any applicable criteria for merit salary increases;
- Considers the needs of the program or department/units;
- Meets the minimum full academic assignment in terms of 12 contact hours of instruction or equivalent assignments in research and service (and, if applicable, clinical and/or administrative assignments).

Part 3. Categories of Assignment and General Expectations for FTE Assignments:

Annual faculty assignments, expressed in percentage of effort, are made in one of five “general” categories, as shown in the table below. Also shown are the sub-categories which are required for mandated effort reporting described briefly in Part 5 of this document. The Annual Assignment module in the Faculty Information System (FIS) allows for assignment to “general” or to “sub-categories”.

General Category	Sub-Categories
Teaching/Instruction	Undergraduate Organized Sections
	Undergraduate Individual Instruction
	Graduate Organized Sections
	Graduate Individual Instruction
	Other Instructional Effort
	Academic Advising
	MCOM – Medical Student Instruction
	MCOM – House staff Instruction
	MCOM – Health Professional Instruction
Research	Department Research
	Sponsored Research
	Creative Activity
Service	Professional & Public Service
	University Governance
Administration	Academic Administration
Clinical ¹	Paid Patient Care
	Clinical Service (Non-Reimbursable)
Other ²	Leave of Absence with Pay/Professional Development
	Release Time for UFF Activities

¹ Only used by those with clinical licenses providing patient care

² Primarily included for Effort Reporting purposes

IMPORTANT NOTE: In order for the University of South Florida to be in compliance with Florida Statutes 1012.945, the “12-Hour” rule, **no more than 8.33% effort can be assigned for each credit of an organized section. Thus, the maximum effort that can be associated with a 3-credit course is 25%.** Variance in assignment of effort for organized course sections should take into account factors such as:

Faculty Assignments

class size, class level, required/elective course, number and variation of course preparations, distance learning, etc.

The following table provide guidelines for the **expected range** of effort for a “typical” faculty member in the General Categories of Teaching, Research, and Service for different types of faculty.

Category	Tenure-Earning	Tenured - Research Productive	Tenured - Not Research Productive	Instructional (Not TT)	Research (Not TT)	Clinical (Not TT)
Teaching	0-50%	0-50%	75-95%	90-95%	0-5%	See USF Health Guidelines
Research	40-95%	40-95%	0-20%	0-5%	90-95%	
Service	5-10%	5-10%	5-10%	0-10%	0-10%	

The above guidelines assume that most tenure-track, tenured faculty in a unit that offers doctoral education teach, on average a 2-2 organized section teaching load. It also assumes that Instructional, non-tenure track faculty teach a 4-4- load and non-tenure track Research faculty have no expectation for teaching of organized sections. Examples of how a “typical” faculty member’s effort may vary based on number of organized sections taught in-load is provided below.

Course In-Load	Teaching	Research	Service
4/4	90-95%	0%	5-10%
4/3	79%	11-16%	5-10%
3/3	68%	23-28%	5-10%
3/2	56%	34-39%	5-10%
2/2	45%	45-50%	5-10%
2/1	34%	56-61%	5-10%
1/1	23%	68-73%	5-10%
1/0	11%	79-84%	5-10%
0/0	0%	90-95%	5-10%

Units are expected to develop guidelines for equitable and fair assignments that meet the general guidelines below. While there may be unit-level variances based on factors such as number and level of degree programs (e.g., bachelors, masters, doctoral) offered in a unit, specialized accreditation, etc., **there can be no variances due to geographic location.** Units whose guidelines deviate from the general guidelines above must have approval by the Provost & Executive Vice President or the Senior Vice President for USF Health, as applicable.

Note on Research Assignments: Research assignments are subdivided into funded research, departmental research and creative activities. To be classified as funded research, the faculty member’s

Faculty Assignments

salary for that percentage of assignment must be derived from a C&G funding source. For example, if a faculty member has a 50% research assignment, and if 10% of his/her salary is C&G derived, the assignment would be subdivided into funded research (10%) and departmental research (40%). If a faculty member is C&G funded but none of the C&G funds are used to pay their salary, that research is classified as departmental research.

Note on Clinical Assignments: While it is expected that the majority of faculty members in USF Academic Affairs will have assignments ONLY in the categories of Teaching, Research, and Service, the recommended percentages will need to be adjusted for USF Health Colleges to include clinical assignments. If a unit in Academic Affairs houses programs which require clinical experiences, typically due to specialized accreditation, unit guidelines should account for clinical assignments, with the approval of the Provost & Executive Vice President.

Note on Administrative Assignments: Academic Administration refers to administrative services benefitting common or joint departmental/college/university activities. This activity provides administrative support and management direction to instructional, research, and public service programs. This category is generally restricted to individuals with formal administrative appointments. Effort related to university, college, department committees, councils, etc. should be reflected under University Governance in the general category of Service. This category does not include direct administrative effort related to a specific course, which should be reflected in the appropriate instruction category. Direct administrative effort related to a specific projects and funded by sponsored research, should be reflected in the “Sponsored Research Category”.

Time allocations for program directors, undergraduate/graduate coordinators, or center/institute directors shall be assigned by chairs (or their equivalent) of the individual sponsoring department (or equivalent) with the approval of the Dean. The “typical” assignment is expected to range from 10-25%.

Part 4. Processes:

Faculty assignments for the new academic year need to be made at least six weeks prior to the beginning of the academic year, although they are generally made sooner, usually in the spring semester prior to the new academic year. There must be a process in place to allow consultation and discussion between the chair and the faculty member. The Faculty Information System (FIS) has built in provisions to ensure that proper notification and consultation occurs. The [USF UFF collective bargaining agreement](#) (Appendix F) allows a formal process to dispute an assignment.

Academic Affairs at USF has transitioned from FAIR to the Faculty Information System (FIS) for both faculty assignments and faculty annual evaluations. All annual evaluations in Academic Affairs units for the 2019 calendar year on the Tampa campus will utilize FIS. Branch campus units have the option of using FAIR for 2019 calendar year evaluations, but future annual evaluations will utilize FIS only. All assignments within Academic Affairs made in Spring 2020 for Academic Year 2020-21 will be made using FIS. USF Health is currently in the process of transitioning to FIS for assignment and annual evaluation.

Part 5. Relation of Assignment to Effort Reporting. Assigned duties provide the starting point for the completion of mandated effort (i.e., the proportion or percentage of time spent on any activity)

Faculty Assignments

reporting as required in the State University Accountability Process^v. USF will continue to utilize the Assigned Faculty Duties-Faculty Activity Report (AFD-FAR) module of FAIR to track effort reporting through consolidation until such time as conversion to FIS is completed. Effort percentages for externally-funded federal research reported to the State and to the Federal government as a part of USF's PERT^{vi} process must be equivalent.

ⁱ Florida Statute 1012.945; CBA, Article 9, Section 9.1

ⁱⁱ http://www.leg.state.fl.us/Statutes/index.cfm?App_mode=Display_Statute&URL=1000-1099/1001/Sections/1001.7065.html

ⁱⁱⁱ <https://carnegieclassifications.iu.edu/index.php>

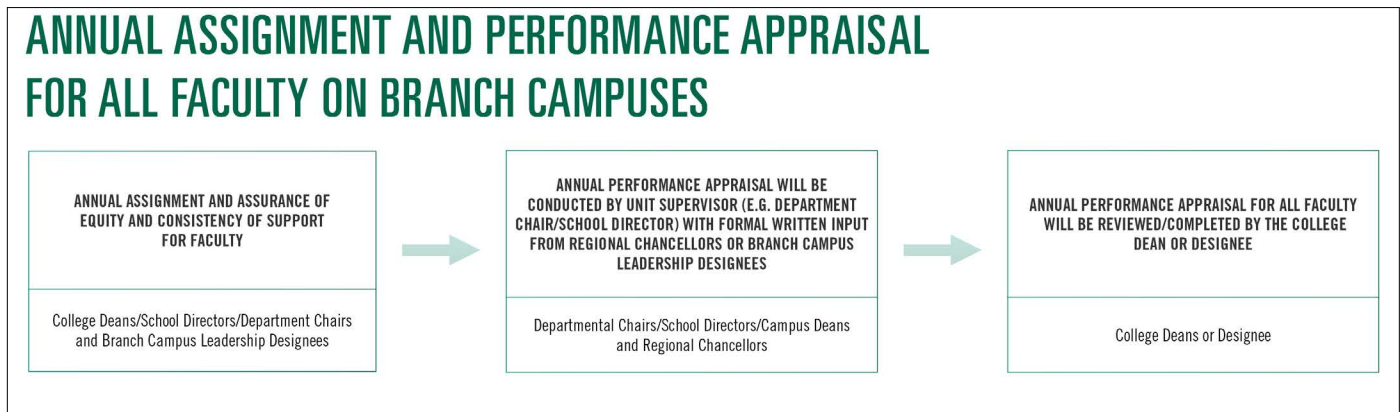
^{iv} CBA, Articles 10, 14, & 15

^v <http://www.flsenate.gov/Laws/Statutes/2019/1001.706>

^{vi} <https://www.usf.edu/research-innovation/sr/pa/pert.aspx>

Faculty Performance Appraisal

Annual assignment and performance appraisal of all faculty on branch campuses (including academic leaders: campus based chairs, campus directors, campus assistant/associate deans, and campus deans) will be conducted in compliance with USF policies and procedures, and consistent with a single set of department/school, college, unit assignment and appraisal guidelines, and will include formal written input by the RC or designee prior to a College Dean or Vice President completing their appraisal.



All other tenure-earning faculty members will be evaluated for tenure and promotion following USF's Guidelines (including those yet to be developed collectively by academic departments, schools and colleges). The new guidelines were adopted by the United Faculty of Florida (UFF) on June 27, 2019, and are effective on July 1, 2020.

Annual performance evaluation processes are described in detail in Article 10 of the USF UFF Collective Bargaining Agreement (<https://www.usf.edu/hr/documents/employment-resources/employee-labor-relations/uff-collective-bargaining-agreement.pdf>).

1. Faculty need to be evaluated at least once annually except if they have received a notice of non-reappointment.
2. Information used in preparing evaluations comes from their immediate supervisor, peers, students, themselves, other university supervisors and individuals responsible in service assignments.
3. Any classroom visits/observations related to annual evaluations must be noticed at least 2 weeks prior to the visit and the date agreed upon by the observed faculty member.
4. The written evaluation must include the faculty member's annual assignment.
5. Each academic department/school develops and maintains its own evaluation processes. A majority of a quorum of unit faculty must approve the processes. These processes must be made available to all faculty in the unit. See the section on Governance Documents
6. The Criteria for annual evaluations are outlined in Article 10.4 of the USF UFF Collective Bargaining Agreement (<https://www.usf.edu/hr/documents/employment-resources/employee-labor-relations/uff-collective-bargaining-agreement.pdf>) and summarized below:
 - a. Teaching effectiveness
 - b. Contribution to the discovery of new knowledge



Faculty Performance Appraisal

- c. Public Service
 - d. Participation in governance processes
 - e. Other assigned duties
7. Faculty teaching in a classroom are required to be proficient in the English language.
 8. The department/unit must maintain a single evaluation file containing all the documents used in the evaluation process. Faculty may examine their evaluation files if they wish. This file may not contain anonymous material other than student evaluations. All student evaluation comments must be included in the evaluation file. In the past these files have been maintained in the FAIR system but USF is currently switching to the Archivum Faculty Information System (FIS).

Academic Affairs at USF has transitioned from FAIR to the Faculty Information System (FIS) for both faculty assignments and faculty annual evaluations. Please visit <https://usflearn.instructure.com/enroll/GGFXXK4> for FIS information and training. All annual evaluations in Academic Affairs units for the 2019 calendar year on the Tampa campus will utilize FIS. Branch campus units have the option of using FAIR for 2019 calendar year evaluations, but future annual evaluations will utilize FIS only. All assignments within Academic Affairs made in Spring 2020 for Academic Year 2020-21 will be made using FIS. USF Health is currently in the process of transitioning to FIS for assignment and annual evaluation.

POST TENURE REVIEW

Post tenure review is also known as Sustained Performance Evaluations. There is a specific process described in the USF UFF Collective Bargaining Agreement (<https://www.usf.edu/hr/documents/employment-resources/employee-labor-relations/uff-collective-bargaining-agreement.pdf>) Article 10.3.B. In summary, the process is carried out every seven years according to a departmental/unit process approved by an elected group of departmental/unit faculty. The sustained review only considers the annual evaluations and associated documents from the previous six years. If a faculty member received at least satisfactory annual evaluations during the previous six years they cannot be rated less than satisfactory for the sustained performance evaluation. If a faculty member's sustained performance is consistently below satisfactory in one or more areas, a performance improvement plan shall be developed by the faculty member in concert with his/her supervisor. This plan would include specific performance targets over a specified time period and be approved by the Vice-Provost for Academic Labor Relations.

Faculty Handbook

As of January 17, 2020, the University of South Florida Faculty Handbook has been revised to reflect the projected consolidated status of the university. However, it should be considered a de facto draft version until consolidation formally occurs in July 2020, at which time appropriate governance and administrative bodies can be engaged in a more comprehensive revision.

The current University of South Florida Faculty Handbook can be accessed at:

www.usf.edu/provost/documents/faculty-forms/usf-faculty-handbook.pdf

New Faculty Orientation

The first group of new faculty members to join the consolidated University of South Florida will begin their employment (with a possible few exceptions) on August 7, 2020.

A New Faculty Orientation program will be developed that encompasses all of these new faculty, regardless of their campus assignment. The projected dates for the new faculty orientation are **August 10-13, 2020**, to be held on the University of South Florida Tampa campus.

A consolidated orientation program will likely require considerable revision from its past format, necessitating close consultation among the three campuses to determine the optimal materials and information to be presented. As well, thought must be given to the accommodation of St. Petersburg and Sarasota-Manatee campus faculty members regarding travel requirements, including the possibility of providing bus service and/or overnight stays. Additionally, thought must be given to incorporating campus specific and/or College orientation sessions in conjunction with the week's events.

Planning for the 2020 New Faculty Orientation should begin sometime in February 2020.

Faculty Support Services

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**USF CONSOLIDATION
ACADEMIC AND STUDENT SUCCESS
IMPLEMENTATION HANDBOOK**

Office of the Provost and Executive Vice President



Professional Development

FACULTY SUCCESS

“Faculty, and staff, are the lifeblood of any preeminent global research university such as USF. The strategic success of the institution is closely linked to the success of its faculty members” (*Faculty Success Strategic Initiative Workgroup. Final Progress Report*, December 15, 2019, p. 6).

Throughout much of 2019, a USF-wide strategic initiatives workgroup has been focused on designing an optimal consolidated structure and program to support Faculty Success on all campuses—including enhanced (a) instructional and learning effectiveness; (b) research, scholarly, and creative productivity and impact; and (c) mutually productive collaboration through engagement with public and private partners in local, national, and global contexts.

This will include, yet need not be limited to:

1. Establishing an Office of Faculty Success at USF, through a consolidation of existing personnel and operations.

This Office will focus on:

- Structure and Culture
- Recruitment and Retention
- Classification and Assessment
- Infrastructure, Partnership, and Support

2. Joining the National Center for Faculty Development and Diversity (NCFDD).

FACULTY DEVELOPMENT – TEACHING & LEARNING

Today, there are several dispersed units across USF campuses providing faculty development. These offices serve the university community in support of learning and instruction-related questions and concerns, facilitating conversations regarding faculty-related matters across the university community, and promoting evidence-based practices. The services offered are personalized and confidential. To varying degrees, these offices provide training, workshops, faculty learning communities, on-demand support, and events and awards that celebrate effective teaching and learning practices.

On the Tampa campus, the Academy for Teaching & Learning Excellence (ATLE) provides support for face-to-face (F2F) and hybrid courses. Support for online instruction is provided by a division of Innovative Education called Digital Learning.

On the St. Petersburg campus, the Center for Innovative Teaching and Learning (CITL) provides support for F2F and hybrid courses. Its sister unit, Online Learning and Instructional Technology Services (OLITS), assists with instructional technologies and fully online classes.

On the USF Sarasota-Manatee campus, the eLearning office provides primary instructional support, with particular emphasis on online learning and leveraging the Canvas platform.

Professional Development

ONLINE LEARNING

USF Innovative Education's Digital Learning supports faculty development through online and lab-based workshops, just in-time training, and one-on-one support for technology training, Canvas, and teaching online. They certify faculty to teach and deliver high quality courses.

Online Certification

The Online Instructor Certification (OIC) is a five-week online course utilizing a cohort-based model designed to cultivate and certify enthusiastic and well-trained innovative educators for USF's online course offerings. The primary goal of the OIC is to introduce faculty to best practices in online instruction, directly impact the success of our students. During the five weeks, faculty interact in professional learning networks while sharing and learning from faculty peers and practitioners, engage in online pedagogical strategies, learn new digital technologies and effective uses of Canvas.

The certification meets USF's SACSCOC accreditation standards 3.4.12, 3.4.9, 3.7.1, 3.7.2, and 3.7.3, and the requirement that all faculty who teach online complete the required certification course

Quality Course Certification

Following the state guidelines for quality online education, Digital Learning collaborates with faculty to ensure best practices for delivering high-quality online courses utilizing the Florida Quality Rubric.

Research and Innovation

SPONSORED RESEARCH

The Office of Sponsored Research enables and safeguards the conduct of research and other sponsored activity for the University of South Florida. We apply specialized regulatory, statutory, and organizational knowledge to balance the university's mission, the sponsor's objectives, and the investigator's intellectual pursuits.

We know it can be overwhelming to navigate the requirements for applying to a grant and working with your sponsored funding, so Sponsored Research is here to help! Organized in teams of subject matter experts, Sponsored Research offers services throughout the research lifecycle - before, during, and after your sponsored award:

Our Proposal Services (Pre-Award) Team

- Assists with the identification of funding opportunities
- Manages Electronic Research Services, such as Grants.gov and NSF Fastlane
- Assists with the development, preparation, and submission of proposals
- Coordinates interest in funding opportunities for limited submissions
- Identifies and coordinates regulatory and compliance requirements
- Negotiates and accepts awards on behalf of the university
- Serves as a liaison for requests and engagement with your funding agency

Our Transactions Team

- Sets up your award in USF's financial system, FAST
- Manages budget transfers and exception requests
- Coordinates with other central offices such as payroll, travel, and purchasing

Our Invoicing and Reporting Team

- Prepares and submits invoices and financial reports
- Coordinates preparation and submission of supporting documentation

Our Closeouts and Financial Compliance Team

- Manages effort reporting
- Reviews and processes expenditure transfers
- Conducts final financial reconciliation of the award at closeout
- Submits required invention statements and property inventory to sponsoring agencies

Our Subcontracting and Sub-recipient Monitoring Team

- Conducts risk assessments of sub-awardees
- Prepares and negotiates subcontracts
- Represents the university as members of the Federal Demonstration Partnership

Research and Innovation

Our Data Use Agreements Team

- Reviews Data Use language in awards and contracts
- Engages with requisite offices related to Data Use on behalf of the PI

Our Audit and Compliance Team

- Manages document production requests during the course of an audit
- Engages with auditors and sponsors conducting review of awards to USF

Our Information Services Team

- Develops and supports digital solutions to assist researchers and research administrators
- Maintains USF Research's digital infrastructure and online services

Our Academy of Certified Research Administrators

- Provides training and resources in all aspects of research administration
- Offers basic and advanced credentialing courses to help you become a Certified Research Administration at the University of South Florida
- Provides fact sheets, reference guides, and collection of resources for research administration, our FacultyOne-Stop

For additional information, contact lists, and access to our resource materials including the FacultyOne-Stop, visit <https://www.usf.edu/research-innovation/sr/>

RESEARCH INTEGRITY & COMPLIANCE

Research Integrity & Compliance facilitates research while ensuring compliance with applicable federal and state regulations and USF policies. Research Integrity & Compliance includes 15 compliance programs, each of which is supported by a program manager and staff. Our programs include:

- Biosafety Program: Incorporates health and safety practices governing all personnel working with biohazardous materials in research and/or teaching activities
- Boating Safety & Scientific Diving Programs: Provides training, support and oversight of scientific diving and for operators of small vessels used in research
- Conflict of Interest Program: Protects the integrity of research by ensuring that research-related conflicts of interest are appropriately disclosed and managed.
- Export Controls: Navigates complex export control regulations
- Institutional Review Board (IRB): Provides oversight for human subjects research conducted by faculty, staff and students.
- Institutional Animal Care and Use Committee (IACUC): Provides oversight for all research and teaching activities, including field studies, involving live vertebrate animals.

Our Applications for Research Compliance (ARC) Help Desk is available to provide technical assistance with the ARC portal, which houses electronic applications for the following programs: Biosafety, COI, IACUC and IRB. The Help Desk team can be reached Monday – Friday from 8:00 am – 5:00 pm at 813-974-2880 or rsch-arc@usf.edu.

Research and Innovation

Our Program Managers and staff are always available to answer questions, provide guidance and conduct education/training.

For more information and contact information for each program, visit our website at <https://www.usf.edu/research-innovation/research-integrity-compliance/>.

USF TECHNOLOGY TRANSFER OFFICE

When you want to use your research discoveries, creative activities, data, or collections to solve real-world problems, we can help. Think of us as a bridge to commercial applications of your work. We will help you identify current industry needs and trends to find the best applications for your technology. Our services include:

- Finding industry-sponsored research funding opportunities
- Protecting your intellectual property (IP) with patents and copyrights
- Drafting confidentiality (NDA/CDA) and material transfer agreements (MTAs)
- Licensing IP to commercial partners who will use it to develop new products
- Vetting startup ideas and helping you set up a company
- Performing patent searches, reviewing contracts, and providing SBIR/STTR support

You will have a dedicated licensing manager as your single point-of-contact to guide you through our commercialization process and put the right agreements in place.

And if we don't provide the service, we'll connect you with the right person who does.

For more information, visit our website at <https://www.usf.edu/research-innovation/pl/>

USF OFFICE OF CORPORATE PARTNERSHIPS

The Office of Corporate Partnerships provides a single point of entry for our current and potential industry partners to help identify and access USF's vast resources across all campuses to advance and accelerate their company's business goals.

When you're looking to collaborate with corporate partners for research projects, industry feedback or academic engagement, we invite you to connect with us. Our faculty services include:

- Identifying and engaging potential corporate partners for research funding, speaking events, student mentorship, or business incubation
- Convening academic-industry meetings and corporate forums in interdisciplinary research areas
- Reviewing and facilitating industry-focused research proposals
- Securing industry letters of support for federal grant proposals
- Facilitating Florida High Tech Corridor Matching Grant funding opportunities

For more information, visit our website at <http://www.research.usf.edu/ocp/>.

Research and Innovation

FACULTY HONORS, PRIZES & AWARDS

The Faculty Honors program assists faculty in identifying and applying for major external awards, and helps the university recognize faculty who receive highly prestigious awards.

Our office offers a wide range of services, including a comprehensive interactive website where faculty can explore opportunities, find resources, and connect with other award recipients. We also hold workshops throughout the year to provide faculty with the latest information on honors and award applications.

Honors, awards, and recognition prizes are available for faculty at every career level.

For more information, visit our website at <https://awards.research.usf.edu>.

Library Support Services

The four USF Libraries -- the Tampa Library (USFT), the Shimberg Health Sciences Library, the Nelson Poynter Memorial Library (USFSP), and USF-SM Library Services -- are the heart of the University's research and teaching endeavor. Our collective mission is to inspire research, creativity, and learning by connecting the USF community to relevant and high-quality information. We drive the discovery of new knowledge through collections, services, and tools that stimulate intellectual curiosity and promote innovation in research and teaching.

Collections held by the four libraries of the USF System support over 200 degree programs at the undergraduate, graduate, and doctoral levels. Collection development practices over two decades have focused on acquisition of e-resources over print, whenever possible, to expand availability, portability, and currency of materials. The USF Libraries jointly manage a collection of 976 databases, 725,522 e-books, and 69,719 e-journals. A small subset of clinical resources is limited to access by USF Health students and faculty. The USF Libraries receive 45 percent of the annual U.S. Government Printing Office publication output in a digital format. Rare and unique primary source materials are held by the Special Collections departments of the Tampa, Shimberg, and Poynter libraries. On behalf of the four USF Libraries, the Tampa Library subscribes to millions of titles offered by the Center for Research Libraries' (CRL) and the Hathi Trust.

Collection sufficiency is determined through program accreditation and reviews and annual environmental scans at the CIP-level for all academic programs. Evidence- and patron-driven acquisition programs ensure comprehensive access to current digital research materials. The USF Libraries' websites function as the primary pathway to collections and information resources. Library materials can be located and accessed through the online catalog, and EBSCO's Discovery Service (FindIt) and access to all Florida public university and college catalogs is available in one search. Online finding aids describe and facilitate access to archival and manuscript collections. Online resources created and hosted by the libraries are globally available at no cost.

While on campus, all students and faculty in the USF system have access to collections through the USF network, with the exception of select licensed resources for USF Health constituents. Remote access to licensed collections and resources is available to all currently enrolled students and faculty using an authentication and proxy system based on the USF Net ID. Distance learners have the same access as on-campus students and may request no cost shipment of print holdings and desktop delivery of copies of print articles held by USF Libraries..

The USF Libraries maintain a service portfolio to support academic and research programs consistent with a top-tier research institution. Core services include: reference assistance, research consultations, and librarian embed; circulation, reserve, and three delivery services; support for GIS and spatial technologies; assistance with data management and federal data management planning requirements; custom metadata services; IP consultation; open-access and traditional publishing support; 3D visualization/AR/VR services; and institutional repository support. Virtual access to services is accomplished through the USF Libraries' websites; in-person access to the facilities, technology, and physical collections are posted on the libraries' respective websites.

Technology enhancements, pedagogical shifts, programmatic shifts, and new and more sophisticated approaches to research productivity and impact are driving the evolution of academic libraries. Research and learning across institutions are becoming more team-based, more interdisciplinary, and increasingly dependent on complex and varied data sources. To meet these and other challenges, the USF Libraries are investing in an innovative path to partner with

Library Support Services

faculty and graduate students through Research Platform Teams (RPTs). RPTs are librarian-led teams that transform collaboration into partnership. With the primary focus on faculty and graduate students, this team approach integrates expertise in library and information science with deep subject knowledge or functional expertise to build a customized “platform” from which the target audience can advance their research goals. The RPT model transforms many aspects of library operations and complements our current focus on undergraduate student success.

In its continuing drive to state and national preeminence, the University of South Florida’s student success initiative is expanding efforts to give every undergraduate student the opportunity to participate in high impact practices. In furtherance of this direction, the Student Success team and the Library Student Success unit are joining forces to launch a program to complement the existing curriculum by employing a series of scheduled in-person workshops and online tools that provide additional value to the faculty’s student learning outcomes. This program employs a formal, multi-tiered undergraduate research curriculum that will be delivered by the USF Libraries, in collaboration with faculty across campus, and under the leadership of the Office of Student Success. The curriculum will complement the faculty’s instructional objectives and alleviate barriers to the adoption of high-impact practices.

For additional information, please visit the websites of your campus library:

USF Tampa

<https://lib.usf.edu/>

USF Health Shimberg Library

<https://health.usf.edu/shimberg-library>

USF St. Petersburg Nelson Poynter Memorial Library

https://lib.usfsp.edu/home?group_id=14551

USF Sarasota-Manatee Library Services

<http://www.usfsm.edu/academics/academic-resources/information-commons/library-services/index.aspx>

Student Success Support Services

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**USF CONSOLIDATION
ACADEMIC AND STUDENT SUCCESS
IMPLEMENTATION HANDBOOK**

Office of the Provost and Executive Vice President



Student Government Elections

ELECTION DATES:

The Student Government General Elections for the consolidated USF will take place on Monday, March 2 through Thursday, March 5, 2020

- If a run-off election is needed, it will occur on Tuesday, March 10 through Wednesday, March 11, 2020

STUDENT GOVERNMENT OFFICES TO BE ELECTED:

System elections

- 1 Student Body President/Vice President (Please note: the USF Student Body President will serve as the student representative to the USF Board of Trustees.)
- 60 Senators

Campus elections (local per each campus)

- 1 Governor/Lt. Governor at each campus
- Campus Council representatives at each campus (A local legislative entity. The number of seats still need to be determined in statutes.)

STUDENT GOVERNMENT INAUGURATION

Thursday, April 16, 2020 (Note: The elected positions will assume their new roles on Monday, May 11, 2020)

For reference please see the One USF Student Government Constitution in the Appendix.

Home Campus

A great benefit offered to students in a consolidated university will be the enhanced mobility across three campuses to take advantage of unique course offerings, services, programs, and events. While student success personnel encourage and anticipate increased student mobility across three campuses, we also expect students to designate a “home campus.” To deliver the right support, to the right student, at the right time, academic advisors and other support personnel need to know where to find students. Likewise, students need to know where to go to utilize a service. Given our commitment and obligation to deliver equitable access to high quality services and programs on all three campuses, the Student Success executive team will monitor demand, assess program delivery, and allocate (or reassign) staff as necessary to ensure that student needs and demands are met in a timely way.

Given these interests and concerns, the Student Success team will be guided by the following best practices and principles:

1. Students will select a major and designate a home campus where that major is available at the point of admission.
2. Home campus is also represented in the student record to support planning of functions such as housing and class size.
3. In the spirit of one USF, geographically distributed, we will not limit the ability of a student to access non-academic services on any campus, regardless of their designated home campus.
4. For the purposes of advising and to promote accountability for student support, services related to a student’s academic major will be determined by the student’s home campus.
5. If a student changes majors to a major not available on their home campus, they will change home campus.

Student Tuition and Fees

All University of South Florida undergraduate and graduate students will eventually pay (no later than January 2024) the same tuition and fee rates, regardless of home campus, and receive equitable access to services on all USF campuses.

Students enrolled as of Spring 2020 will pay tuition and fees at current local rates through graduation (provided they are continually enrolled in subsequent semesters and graduate no later than December 2023), unless those rates are changed at any point by the state legislature or Florida Board of Governors. Students first enrolling in Summer 2020 will pay current local tuition and fees for that term and, beginning Fall 2020 will pay rates aligned with the preeminent university. Students first enrolling in Fall 2020 will pay tuition and fees aligned with the preeminent university.

To ensure fairness and equity in the allocation of student fees, “Students enrolled at branch campuses shall not be assessed fees in excess of the amount necessary to pay for those services readily available and directly accessible to branch campuses. Student fees at the branch campuses shall not be used to pay for a disproportionate share of fixed costs or otherwise be used to subsidize the costs of services being provided primarily to students on the parent campus.” (*University of South Florida as One University Geographically Distributed*, p. 9).

To assure equitable student access to services across each campus, the university will convene a governance committee to provide oversight for the allocation of student fees. This committee, composed of representatives from each campus, will recommend the appropriate distribution of fee revenues across the campuses to ensure that students at each campus have equitable access to services.

“Students enrolled at branch campuses shall not be assessed fees in excess of the amount necessary to pay for those services readily available and directly accessible to branch campuses. Student fees at branch campuses should not be used to pay for a disproportionate share and fixed costs or otherwise be used to students on the parent campus” (*University of South Florida as “One University: Geographically Distributed”*, p. 9).

Academic Advising

The delivery of effective academic advising is a critically important element of any student success initiative and USF has been no exception. Each campus transitioned to a professional academic advising model, and these advisors have contributed significantly to student success gains. In the summer of 2019, USF was invited to participate in Excellence in Academic Advising, a national initiative administered by the prestigious Gardner Institute, in collaboration with the National Academic Advising Association (NACADA). In the spring of 2020 the Vice President for Student Success will convene a task force composed of representatives from all three campuses. This task force will be charged to develop a strategic plan to “advance student learning, success, persistence, retention, and degree completion through a comprehensive, standards-based strategic planning process to promote excellence in academic advising” for a consolidated USF.

The Excellence in Academic Advising task force will conduct a self-study, guided by an external consultant. The strategic planning process will cover institutional commitment; learning; improvement and the scholarship of advising; organization; equity, inclusion, and diversity; advisor selection and development; collaboration and communication; student purpose and pathways; and technology enabled advising.

By participating in this strategic planning process, the Student Success units, working in collaboration with colleges and other units across all three campuses, will develop an intentional plan to organize, train, and assess advisors’ contributions to student success. More importantly, the strategic plan will also develop a coordinated plan to deliver advising consistently and effectively to meet the demands of one USF, utilizing technology and analytics as appropriate to carry out their mission.

Although the academic advising community at USF is well-represented through a multi-campus Council of Academic Advisors, the advisors presently operate in different administrative structures. The academic advisors at USF Tampa operate in a hybrid model. Most advisors are “decentralized,” embedded in the colleges and assigned to departments with a reporting line to a director of college advising. Students in exploratory majors are advised through the Office of Undergraduate Studies. At USFSP and USFSM, advising is “centralized” in a one-stop shop, with a handful of advisors assigned to specific colleges or departments, but reporting to a director with campus-wide responsibilities. The centralized shop allows for the efficient, personal, and timely delivery of academic advising services. Such a structure is not physically possible in Tampa, but at the branch campuses, the centralized model represents an asset that can be enhanced by participating in the EAA process and creating open lines of communication and collaboration across the colleges and campuses.

Despite the different models for academic advisors, the structures, processes, and technology are in place to promote effective communication and collaboration across three campuses. The Council of Academic Advisors will play a critical role in the EAA strategic planning process and provides a forum for the deliberation and resolution of any academic advising concerns related to consolidation. The Assistant Dean of Advising and Analytics (ADAA), Dr. Melissa Irvin, provides any needed support, coordination and collaboration for advising-related activities within and between USF campuses. As the CAA ex-officio and member of the CAA Executive Committee, the Dr. Irvin advocates on behalf of the community, establishes two-way communication between the advising community and other stakeholders, and serves as an institution-wide advising representative for institutional strategic initiatives.

Academic Advising

While the EAA initiative is ongoing, advising at each campus will utilize the existing technology infrastructure (Archivum and DegreeWorks) to ensure students can seamlessly receive support from any campus if needed:

1. Undergraduate students have access to schedule appointments with any advisor regardless of the student's campus or major.
2. Advisors can schedule or transfer undergraduate advising appointments with or to other advisors regardless of campus or college.
3. Archivum appointment notes, general notes, referrals and cases are visible to advising users regardless of the student's or advisor's campus location providing transparency and accessibility to the students' advising history.
4. Advisors have the option to list "Skype" (language will be updated) as an advising delivery option so students can request virtual appointments.
5. DegreeWorks audits are accessible and visible to any advisor for all undergraduate students regardless of campus.

At some point during the EAA strategic planning process and in collaboration with College Dean, we may elect to change the organizational structure of academic advising. If that is done, it will be done as part of a strategic decision to implement a comprehensive advising strategic plan that emerges from the EAA process, a plan designed to advance well-defined strategic initiatives and advance the teaching and learning outcomes of consolidated colleges and departments. Until that time, the Regional Vice Chancellor and Vice Provost at the branch campuses will be responsible over the delivery of academic advising. They will report to and be held accountable by the Vice President for Student Success.

Mental Health Counseling

To meet increasing student demand and enhance the quality of services provided to students on our three campuses, each campus is implementing the MWell4Success initiative, a collaborative systems-thinking and public health-based approach to enhance the capacity of our university to meet the mental health needs of our students on a continuum of care needs. Using a three-tiered approach, professional staff on each campus provide universal, targeted, and intensive services to students. Through educational outreach and coaching services (Tier 1), the Health & Wellness team on each campus will increase mental health literacy. Through extended hours and satellite stations (Tier 2), the team will enhance services to targeted students. By expanding Counseling Center staff, each campus will implement coordinated care management.

In a consolidated USF, students will have access to mental health resources on any campus. However, the distance between campuses might make it difficult for students to travel to other campuses for counseling services. Hence, the Health & Wellness teams will strengthen counseling services through the MWell4Success program on each campus, and we expect students to first seek services on their designated home campus. In the rare event that a student seeks services elsewhere, coordination and communication between the teams on each campus should facilitate the coordination of care management.

The Director of the Counseling Center in Tampa, Scott Strader, will continue to report to the Executive Director of Student Health Services, Dr. Joe Puccio, and direct counseling center activities on the Tampa campus.

The Director of the Counseling Center in St. Petersburg, Anita Sahgal, reports to the Regional Vice Chancellor of Student Success on the St. Petersburg campus, Dr. Patti Helton, and will continue to supervise counseling center activities on the St. Petersburg campus.

At Sarasota-Manatee, counseling services are provided to students by contract with New College. The Vice Provost at Sarasota-Manatee, Dr. Brett Kemker, is responsible for ensuring equitable access to mental health counseling on that campus. Unless and until such time as the Sarasota-Manatee campus develops the capacity to deliver these services, this arrangement with New College will continue.

However, the Health and Wellness team will continue to refine and enhance practices under the supervision of the Student Success cabinet to ensure that all students have equitable access to high quality services.

Three behavioral intervention teams currently operate on each campus. Their activities are coordinated through Symplicity, a case management tool that allows for referrals across all campuses. In a consolidated university, the practices and policies should be tightly coordinated to facilitate timely and effective interventions and referrals across the three campuses. The Associate Vice President of Health & Wellness will be charged with the authority and responsibility to standardize operations across the campuses.

Financial Aid

The Office of Financial Aid (OFA) on the Tampa campus has functioned as a university-wide office since its inception, with the branch campus offices performing some processing tasks as well as delivering customer service. All federal and state aid programs are awarded, managed and reconciled as required by staff on the Tampa campus. Both the US Department of Education and the Florida Office of Student Financial Assistance consider USF to be a single entity. The financial aid module of Banner, other technology platforms, and reporting is centralized and managed by OFA in Tampa.

OFA awards financial aid in a campus blind manner, with the exception being USF Foundation funds that may have donor restrictions for campus and/or college. As a result, a student's financial aid is portable, which will facilitate student's movement between campuses, an identified goal and benefit of consolidation.

Real time and recorded staff trainings via Any Meeting (typically 30 annually) have been delivered to all campuses since 2008. This assures consistency and accuracy of processing, customer service, and lower risk of audit findings in a highly regulated environment.

Beginning in 2016, an annual fall planning retreat included leadership from the branch campuses to assure that they had input into OFA operations and that their students' needs were being addressed.

In consolidation, changes will mainly be limited to staff reporting and accountability. However, there are some functions and programs on the St. Petersburg and Sarasota-Manatee campuses that are currently located in other offices in Tampa. An inventory of those will be taken in the coming weeks to make sure that they are appropriately housed and can continue without interruption.

We have already consolidated our scholarship system with a single vendor serving all campuses. This has resulted in cost savings on the St. Petersburg campus. We are also launching a Chabot on the Tampa campus OFA website with the goal of improving customer service. With a consolidated OFA website, all USF students will be able to utilize this helpful self-service tool.

There will also be opportunities to extend the nationally recognized services offered by the Tampa campus Financial Education Office to Sarasota-Manatee students and build upon the program offered in St. Petersburg.

Because of relationships already in place and the high level of collaboration currently occurring among the three campus offices, leadership expects a smooth transition with consolidation.

Career Services

The AVP of Community Engagement and Career Readiness will provide strategic direction for initiatives designed to prepare students for lifelong career success in a rapidly changing and globalized workforce. In a consolidated USF, career services personnel on each campus will provide innovative career readying programming that facilitates successful connections among our students, campus, and community partners. Although career services programs will not be consolidated into a single administrative unit, practices will be standardized across all three campuses under the supervision of the Student Success cabinet. These practices include the utilization of the following tools:

Career Advocacy. This new model provides a framework for delivering career readying programs and services at scale across all three campuses. A single Canvas course, Career Navigator, (currently in development) will be deployed to all students on all three campuses that will serve as a single, consolidated point of entry for career services and serve as the foundation for an online career coach that is available around the clock.

Handshake. This online career management system is already available to students on all three campuses. Students can access the tool to search and apply for internships, co-ops, part-time, and full-time jobs via their home campus. While employers can opt to make opportunities available to students on all three campuses through a single posting, many do not. By July 1, 2020, there will be only one USF in Handshake for employers to post opportunities to, providing students on every campus access to all opportunities.

Career Readiness Badging. This program, designed in Canvas, provides students with an online tool to capture their academic and co- and extra-curricular experiences, alongside activities to reflect on those experiences connecting them to pathways for entering the workforce or continuing on to post-baccalaureate education. It is currently open to students on all three campuses through a variety of academic, co-curricular, and student affairs channels.

My Plan + My Pathways. This program provides students with early access to career assessments that help them understand how their personality and interests align to best fit occupational pathways and majors offered by USF. This program is currently offered on our Tampa and St. Petersburg campuses and will be extended to Sarasota-Manatee as resources permit.

Class (and classroom) Scheduling

The Office of the Registrar (URO) is one of three Student Success units that will be “centralized,” with reporting lines of staff on three campuses going to the University Registrar, Catherine Mund. Therefore, authority and responsibility for class and classroom scheduling rests with the University Registrar.

In anticipation of consolidation, the URO met with college schedulers and leadership from all campuses throughout the fall 2019 semester. Because course offerings take months to build, the Summer and Fall 2019 section information were “rolled” to the colleges’ schedulers to start building Summer and Fall 2020 offerings.

In December 2019, the URO began receiving consolidated program lists from the System Academic Office; from these lists, the URO initiated building a consolidated curriculum in Banner. Where there is a change due to consolidation, the URO must rebuild each college, department, major, minor, concentration, and course master in Banner. This information will be accurate for Summer 2020 graduation in a consolidated USF, but not ready for Summer and Fall registration, which opens March 30, 2020. The URO will coordinate with IT, ODS, RMA and UCO to focus on technical solutions to ensure chart fields and fees are accurate for Summer and Fall 2020 sections.

Currently, 25Live is used to schedule course sections in general use classrooms across all campuses; courses are placed in appropriate classrooms based on size, resources, and pedagogy using 25Live. The Registrar teams on Tampa and St. Petersburg schedule general use classrooms, whereas Facilities at Sarasota-Manatee and Shared Student Services in USF Health oversees 25Live on those campuses. Tampa colleges have also begun using Ad Astra Platinum Analytics as a tool to predict course demand.

All campuses follow the published Class Schedule Timetable of tasks and due dates; this is developed and coordinated by the URO. The academic course schedulers in each academic department are responsible for ensuring due dates are met and tasks are completed on time.

Time patterns currently differ by campus. All courses must have rooms assigned before registration starts; otherwise, they must remain on hold. All courses must have fees and attributes assigned before registration starts; otherwise, they must remain on hold. Alternate calendar sections can be immediately accommodated in dedicated space, but are not assigned in general use spaces until after the drop/add deadline.

The URO strongly recommends rebuilding section offerings for 2021, starting with the Spring 2021 section offerings, and repeating with Summer 2021 and Fall 2021 offerings. Spring 2021 section building will begin in February 2020, followed by Summer and Fall in September 2020. Even with IT’s assistance to script a good portion of the updates, rebuilding will require additional resources and time on task from the Colleges’ schedulers. Building each section from updated course masters will ensure correct college and department codes, fees, chart fields, general education requirements, and pre-requisites.

In the spring 2020 semester, the registrar’s office will engage with space managers across all campuses to consider the feasibility and value of aligning space management under the URO across the campuses. We may be able to improve the student experience and increase opportunities for cross-campus offerings by implementing same time patterns and final exam schedules.

To ensure the Office of the Registrar has updated points of contact for Academic Course Schedulers, Department

Class (and classroom) Scheduling

Chairs and Deans, an email will be sent directly to each College Dean the first week of February 2020 with a date to be returned to the Office of the Registrar.

Process change updates will be coming directly from Catherine Mund in the Office of the Registrar; stay alert for these changes. It is the responsibility of each college to allocate adequate staffing for a rebuild of all sections, starting with the Spring 2021 sections. This heavy lift will begin as soon as course masters are rebuilt, anticipated kick off in late spring/early summer 2020, and continue until the process is complete for all Spring, Summer and Fall 2021 section offerings. This task will not be business as usual; each college will need to (re)allocate resources to re-build sections with sound prerequisites, fees, and meeting patterns that are assigned to the correct departments and colleges in one USF.

APPENDICES

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**USF CONSOLIDATION
ACADEMIC AND STUDENT SUCCESS
IMPLEMENTATION HANDBOOK**

Office of the Provost and Executive Vice President



ONE USF

17 October 2019

To: University of South Florida (USF) Community

From: Steven Currall, President, USF



Karen Holbrook, Regional Chancellor, USF Sarasota-Manatee



Martin Tadlock, Regional Chancellor, USF St. Petersburg



Regarding: Consolidation Update

During the past several months, we have been working closely and collaboratively to develop an administrative and organizational structure for a consolidated USF, which is referred to as “One USF, Geographically Distributed.”

Consolidation of USF’s three campuses is an extraordinary opportunity for the USF community to strengthen our stature as a Preeminent Research University and to converge on new and innovative ways to serve our students, faculty, alumni and the broader Tampa Bay region in our quest to be a top-25 public university and eventual eligibility for membership in the Association of American Universities.

The consolidation plan will enable us to simultaneously: (1) achieve and maintain a single institutional accreditation by the Southern Association of Colleges and Schools, Commission on Colleges (SACSCOC), (2) comply with state law (Florida Excellence in Higher Education Act of 2018 and CS/HB 7071 of 2019), (3) respect the spirit of our Board of Trustees-approved Guiding Principles for Consolidation and (4) honor the exhaustive work done by the USF Consolidation Planning Study and Implementation Task Force.

Consolidation is a complex process that involves numerous stages of deliberation and implementation with multiple stakeholders. The revised plan presented today is a “version 2.0,” which provides an update and refinement of our thinking. This plan will continue to evolve as we refine administrative, organizational, and operational details (e.g., guidance for department chairs on course delivery and faculty assignments) to ensure that consolidation is a success.

Last month, the USF Board of Trustees received a preliminary framework regarding some aspects of consolidation with the expectation that continued dialogues would allow us to refine the framework ahead of our internal deadline at the end of this calendar year.

Since that presentation in September, there have been many deliberations among key stakeholders, including our regional chancellors; deans, department chairs and members of the faculty, staff and students from all three campuses; community supporters and legislators. We have welcomed the feedback and have been encouraged by many productive ideas.

Today, we, the President of USF and Regional Chancellors of the St. Petersburg and Sarasota-Manatee campuses, share a revised structure that includes important updates regarding how USF will comply with both accreditation standards and state law.

Under our revised plan, new strategic investments will preserve the distinctive identities of each of our campuses, building on areas of strength and drawing upon faculty expertise from across USF campuses and colleges. This new proposed structure includes, for example:

- A reassignment of oversight of some USF Muma College of Business academic programs to the St. Petersburg campus, such as the B.A. in Finance and Master's in Finance degrees;
 - An interdisciplinary USF Center of Excellence in Oceanographic and Environmental Sciences on the St. Petersburg branch campus;
 - An interdisciplinary USF Center of Excellence in STEM Education on the St. Petersburg branch campus;
 - Distinctive programs in Journalism and Digital Communications on the St. Petersburg branch campus, leveraging their proximity to the Poynter Institute for Media Studies;
 - A path for expanded nursing, public health, architecture and community design, engineering and other programs on both the St. Petersburg and Sarasota-Manatee branch campuses;
 - An interdisciplinary USF Center of Excellence in Aging Studies on the Sarasota-Manatee branch campus;
 - A distinctive partnership between the USF College of Education and the Florida Center for Partnerships in Arts-Integrated Teaching on the Sarasota-Manatee branch campus;
 - Distinctive programs in Risk Management and Insurance; and Hospitality and Tourism Management on the Sarasota-Manatee branch campus; and
 - Additional specialized academic programs and/or centers of excellence contemplated for the future.
-
- Student success services, including advising, student advocacy, mental health counseling, financial aid and career services will continue to be delivered locally to ensure that all our students have expedient and equitable access to the support they need, wherever they may be.

- The university budget, in its development, approval and expenditure phases, will be fully transparent. The campus boards will approve budget recommendations for the branch campuses. The tuition, fees and the state appropriations for the branch campuses, will be detailed. All multi-campus budget units (e.g., multi-campus colleges) will include details for the distribution of funds between the main and branch campuses. The President will report to the Board of Trustees how Preeminence or Legislative Budget Request funds are allocated to the three campuses.
- Regional Chancellors will have clear responsibility and accountability (i.e., “authority”) for academic and budgetary decisions, including:
 - Responsibility and accountability for decision-making regarding branch campus academic programs, in collaboration with college deans and faculty members;
 - Responsibility and accountability for campus academic performance outcomes;
 - Responsibility and accountability for assessing and planning future faculty needs at branch campuses;
 - Responsibility and accountability for assessing faculty and promotion decisions on branch campuses;
 - Responsibility and accountability for providing equitable support services for all students, faculty and other personnel on branch campuses, including local support for research, scholarly and creative activity, as well as professional development opportunities;
 - Responsibility and accountability to propose and implement branch campus budgets, taking into consideration distinctive student demands and local workforce needs;
 - Responsibility and accountability to lead daily branch campus operations, including campus safety, emergency preparedness/response and external affairs such as fundraising and local community partnerships, and
 - Serving on the President’s Cabinet and as ex-officio members of the USF Foundation Board.

A detailed description of this revised framework can be found [here](#).

We are pleased with the support from USF key stakeholders who have been deeply involved in this process since its inception.

Further refinements to the consolidation framework (i.e., “version 3.0”) will be formally presented to our Board of Trustees at its next meeting on 3 December 2019, as part of our comprehensive “substantive change” prospectus that is due to SACSCOC no later than 15 March 2020. At that time, we will also have developed even more detailed information on alignment of academic programs, departments and colleges and other critical support structures.

We continue to welcome feedback, questions and ideas as we move closer to shaping the future of our university together. Thank you for everything you do to support USF, our students and the region we serve.

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FACULTY HISTORY

Archivum's Faculty Information System (FIS)

This tutorial discusses the Faculty History portion of the FIS.

January 16, 2020 - Please see Canvas course for future updates.

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Faculty History Tutorial

Logging Into the System

To begin, log into the **my.usf.edu** portal.



Then on the horizontal task bar, go to **Business Systems** and from the dropdown menu, select **Archivum**.



Once in the Archivum platform, you will see several options on the green horizontal task bar. Click on **Records** and select the **Faculty** option from the menu.



Faculty History Tutorial



Once you select Faculty, you will see a **SEARCH** option that allows you to enter your **Name**, **UID** or **Employee ID**. Enter any one to access a link to your Faculty Record.

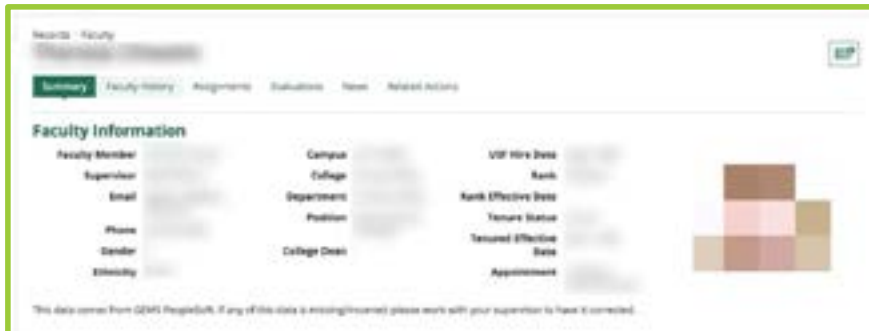
Please note that the names are case sensitive.

Your name should then appear below the search fields. Click on your name, which will open your Faculty Record.



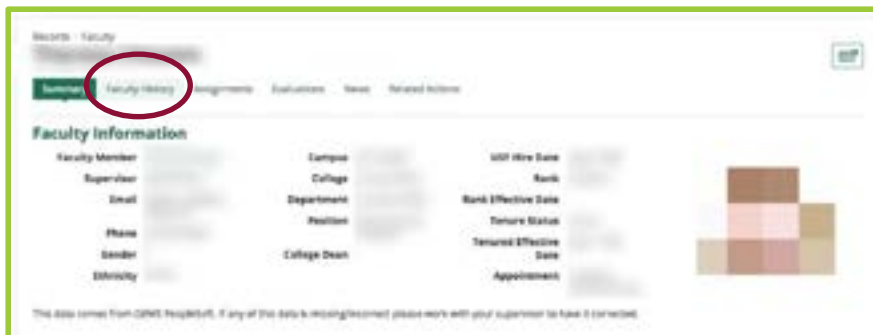
On the first page, the default tab is a **Summary** of information about you that is auto-populated from GEMS, USF's HR system.

Faculty History Tutorial



If any of the information within this summary page is incorrect, you will need to work with your Supervisor, which could be a Supervisor or Department Representative, to have the information updated in GEMS.

The next tab at the top of the Records page is titled **Faculty History**. This option will allow you to begin developing a record of your activities and is the focus of the rest of this tutorial. This information in your Faculty History can then be used in Annual Evaluations and Tenure or Promotions dossiers.



Clicking on the Faculty History link brings you to a page that allows you to select and enter information about your Experience & Education, Teaching activities, Research and Creative activities and Service activities. There is also a link for you to upload Supplemental Materials that you may want to include and use in your Annual review or for T&P purposes.

Faculty History Tutorial

Records - Faculty

UNIVERSITY OF SOUTH FLORIDA
Office of Decision Support

MANAGE FILES

Summary **Faculty History** Assignments Evaluations News Related Actions

My Faculty History

Some of the information contained below will be used within faculty evaluations and applications. It is important to keep the below information up-to-date.

Experience & Education Teaching Research and Creative Activity Service Supplemental Materials

EDIT EDUCATION
EDIT EXPERIENCE
EDIT PERSONAL STATEMENT

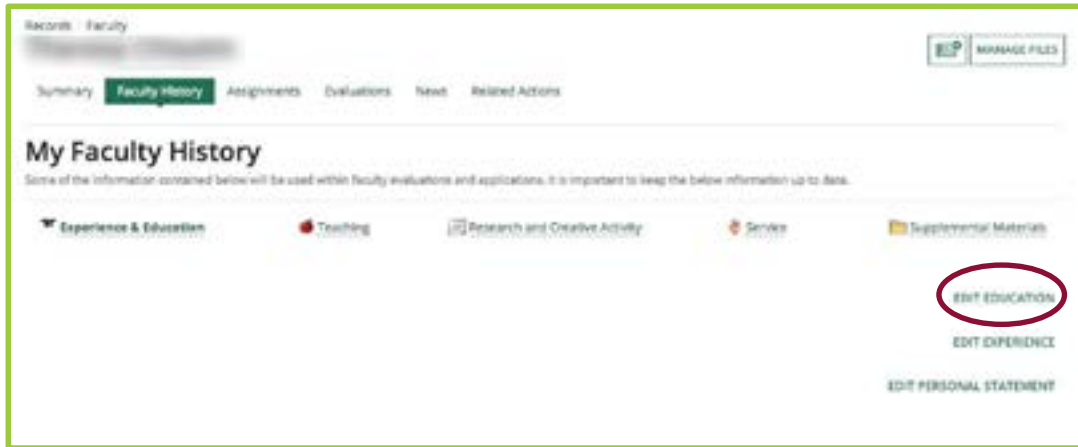
Faculty History Tutorial

Experience & Education

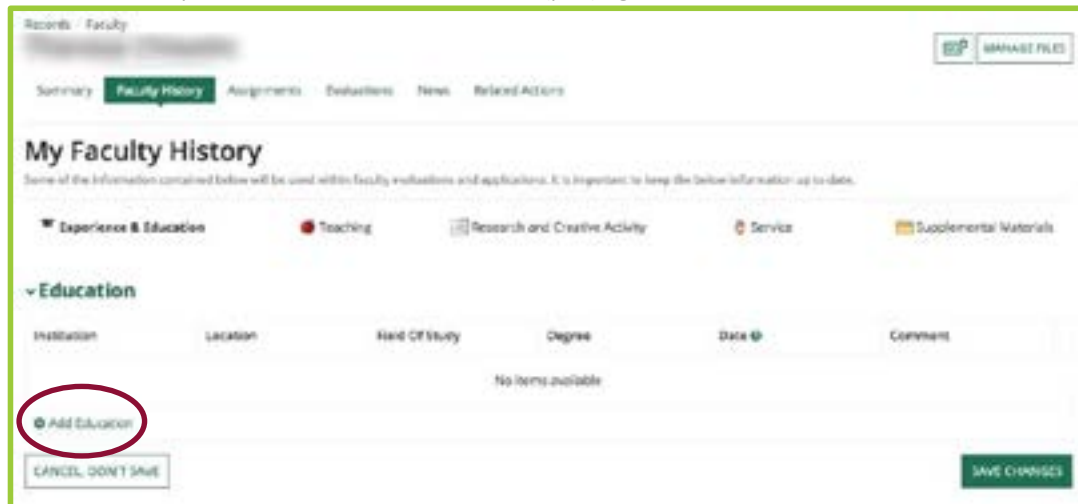
Let's start by populating the Experience & Education section.

Edit or Add Education

To add or edit information about your education, click on the **Edit Education** option on the righthand side of the screen.



Then click on the option to **Add Education** next to the + (plus) sign on the left-hand side.



Faculty History Tutorial



This will open up a row which will allow you to enter the name of the institution, the location, your field of study and the date.

Please note the question mark shown next to the date. Any time you see a question mark it means there is a hint related to the entry.

Also note that for the Degree designator, a drop-down menu is provided. If your degree designator is not listed, you may select Other.

In many sections of the Faculty History, you will see a Comments box like the one shown here. These are optional and you may find them useful. In terms of Education, for example, if you graduated with honors, you could indicate it in the Comments box.

Once you have completed entering the information for one of your degrees, it is recommended that you click the **Save Changes** button.

To add information about additional degrees or educational experiences, simply click the **Add Education** button on the left. You will also have the ability to delete entries by clicking the red X.



TIP

You can wait until you have multiple entries before saving, but the recommendation is to save often.

Faculty History Tutorial

Institution	Location	Field Of Study	Degree	Date	Comment
			--- Select a field ---	mm/dd/yyyy	Graduated with Honors X
			--- Select a field ---	mm/dd/yyyy	X

Education

Institution

Add Education

CANCEL, DON'T SAVE

If at any time you make an error or wish to exit without saving, you can click on **Cancel, Don't Save**. Please note that you must complete working within a section before moving on to another section.

Edit or Add Experience

After you have completed entering and saving your Education, click on the **Edit Experience** option on the right.

Records: Faculty

Summary Faculty History Assignments Evaluations News Related Actions

My Faculty History

Some of the information contained below will be used within faculty evaluations and applications. It is important to keep the below information up to date.

Experience & Education Teaching Research and Creative Activity Service Supplemental Materials

EDIT EDUCATION
EDIT EXPERIENCE
EDIT PERSONAL STATEMENT

The process is similar as before. Click the **Add Experience** button on the left.



Faculty History Tutorial

My Faculty History
Some of the information contained below will be used within faculty evaluations and applications. It is important to keep the below information up to date.

Experience & Education Teaching Research and Creative Activity Service Supplemental Materials

Education

Institution	Location	Field of Study	Degree	Date	Comment
					Graduated with Honors

Experience

Place	Position/Title	Start Date	End Date
		mm/dd/yyyy	mm/dd/yyyy

Add Experience

CANCEL, DON'T SAVE SAVE CHANGES

Then enter the **Place** of employment and the **Position/Title** that you held, as well as the **Start** and **End Dates**.

Leave the End Date blank for any currently held position.

Once you have saved information about your work-related experience, you have the option of adding a Personal Statement. Simply click on the **Edit Personal Statement** option on the righthand side.

Experience

Place	Position/Title	Start Date	End Date

EDIT EXPERIENCE

EDIT PERSONAL STATEMENT

This section can be used to create a short Bio statement or any other kind of personal statement, for example, your teaching philosophy. You can, however, leave this section blank.

Personal Statement

Please enter a short narrative about yourself. Limit of 3000 characters.

0/3000

CANCEL, DON'T SAVE SAVE CHANGE

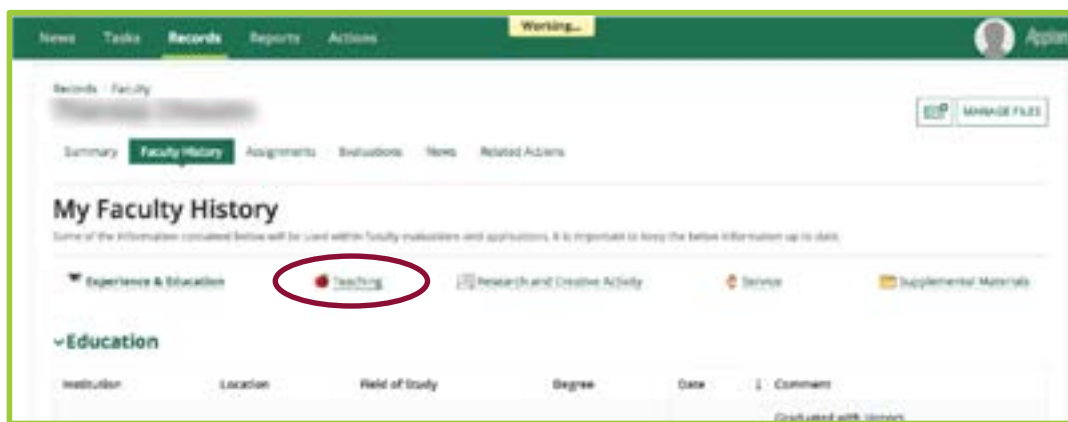
Faculty History Tutorial



You can type directly in the text box, or you can cut and paste from a text editor, but please note that the character counts may be different, as word processors and other applications typically have additional hidden characters.

Teaching

Now let's move to the Teaching section of your Faculty History.



Courses Taught

Once you click on Teaching, all the courses that you taught and are currently teaching at USF will be auto-populated from our student information system, Banner, and shown in a grid with additional course specific information.

At the bottom of the grid, you will see the total number of courses you taught or are currently teaching at USF.



Faculty History Tutorial

▼ Courses Taught

Courses Taught at USF

The grid below shows a faculty member's courses taught at USF as well as the student evaluation data for the given course, if applicable. Click on the student response rates to see the student comments for the selected course when available. The courses taught are pulled in directly from the USF Banner system.

Term	Level	Course	Section	Ref. #	Students Responded	Students Enrolled
2017 FA	GR	SPA 606 Independent Study	001	87522	0	2
2017 SU	UG	SPA 4906 Independent Study	001	53834	0	1
2017 SU	UG	SPA 4906 Independent Study	002	53927	0	1
2015 SU	GR	SPA 6913 Directed Research	004	30270	0	1
2015 SP	GR	SPA 6913 Directed Research	002	10914	0	2
2014 SU	GR	SPA 6913 Directed Research	006	50326	1 (Click for Comments)	5
2014 SU	UG	SPA 4913 Directed Research	003	34820	0	1
2014 SU	GR	SPA 6508 Pract. Clerkship I AuD	001	58144	2 (Click for Comments)	12
2014 SP	GR	SPA 6913 Directed Research	006	16653	1 (Click for Comments)	4
2014 SP	GR	SPA 6508 Pract. Clerkship II AuD	001	23881	6 (Click for Comments)	13

1 - 10 of 155 >

In addition to the auto-populated course information, you can add information about courses you taught outside of USF by clicking on that option on the right.

2014 SP	GR	SPA 6508 Pract. Clerkship II AuD	001	23881	6 (Click for Comments)	13
---------	----	----------------------------------	-----	-------	------------------------	----

1 - 10 of 155 >

Courses Taught Outside USF

List all relevant courses taught outside of the USF system.

No courses taught outside the USF system have been entered.

EDIT COURSES TAUGHT OUTSIDE USF

EDIT AWARDS AND DISTINCTIONS

EDIT COMMITTEES

EDIT TEACHING GOALS

Simply click the "Edit Courses Taught Outside of USF" button followed by the "Add Course" link.

Courses Taught Outside USF

List all relevant courses taught outside of the USF system.

No courses taught outside the USF system have been entered.

EDIT COURSES TAUGHT OUTSIDE USF

EDIT AWARDS AND DISTINCTIONS

Faculty History Tutorial

Courses Taught Outside USF
List all relevant courses taught outside of the USF system.

Year	Term	Prefix	Number	Title	Comment
No items available					

Add Course (circled in red)

CANCEL, DON'T SAVE SAVE COURSES CHANGES

You can enter the Year, select the term from a drop-down option, enter a Prefix, Number, Title and a Comment. Note that all the fields except for Year and Title are optional. Please remember to click "Save Courses Changes" after you enter information.

Courses Taught Outside USF
List all relevant courses taught outside of the USF system.

Year	Term	Prefix	Number	Title	Comment
	— Select a value —				
	— Select a value —				
	— Select a value —				

Add Course

CANCEL, DON'T SAVE **SAVE COURSES CHANGES** (circled in red)

Awards and Distinctions

Other options within Teaching include providing information about Awards and Distinctions and Student committees on which you served.

Faculty History Tutorial



Courses Taught Outside USF
List all relevant courses taught outside of the USF system.
No courses taught outside the USF system have been entered.

[EDIT COURSES TAUGHT OUTSIDE USF](#)
[EDIT AWARDS AND DISTINCTIONS](#)
[EDIT COMMITTEES](#)
[EDIT TEACHING GOALS](#)

[EDIT COURSES TAUGHT OUTSIDE USF](#)
[EDIT AWARDS AND DISTINCTIONS](#)
[EDIT COMMITTEES](#)
[EDIT TEACHING GOALS](#)

Clicking on “Edit Awards & Distinctions” allows you to add entries by first selecting the type from a drop-down menu, and then providing details and dates about the entry.

Teaching Awards, Distinctions
List all relevant honors, awards, distinctions, etc.

Type	Details	Year Received/Activity Dates
No items available		

[Add Entry](#)
[CANCEL, DON'T SAVE](#) [SAVE AWARDS AND DISTINCTIONS CHANGES](#)

Committees

[EDIT COURSES TAUGHT OUTSIDE USF](#)
[EDIT AWARDS AND DISTINCTIONS](#)
[EDIT COMMITTEES](#)
[EDIT TEACHING GOALS](#)

The “Edit Committees” button allows you to enter information about your supervision of individual student research and creative activities.

To add information about students you supervise just click the "Add Student" link on the left.

TIP
Always save your changes!

Faculty History Tutorial

UNIVERSITY OF SOUTH FLORIDA
Office of Decision Support

▼ Supervision and Committees

My unit does not utilize Post Docs.
 My unit does not have a Ph.D. program.
 My unit does not have a Master's program.

Type	Student	Service Start Date	Service End Date	Director	Professional Career Information

No items available

Add Student

CANCEL, DON'T SAVE SAVE COMMITTEES CHANGES

You can enter the "type" of student committee from the drop-down menu and then the student's name and dates of supervision.

Leaving the end date blank means the supervision is ongoing.

Type: Student

Service Start Date: mm/dd/yyyy

Service End Date: mm/dd/yyyy

Director: [icon]

Professional Career Information: [icon]

Add Student

If you directed the student's work, tick the box, and finally, if you have any information about the student's current career or current continued education, you can enter that information in the last box.

Research & Creative Activity

Now let's navigate to the "Research and Creative Activity" tab.

Summary **Faculty History** Assignments Evaluations News Related Actions

My Faculty History

Some of the information contained below will be used within faculty evaluations and applications. It is important to keep the below information up to date.

Experience & Education **Teaching** **Research and Creative Activity** Service Supplemental Materials

Books

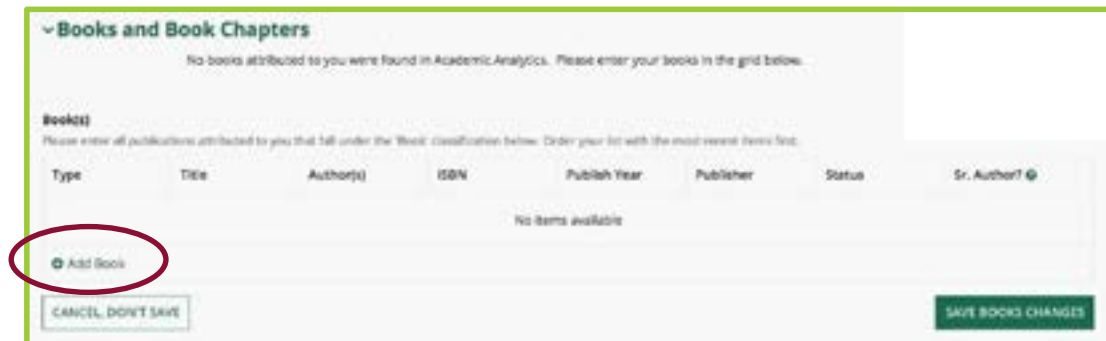
To edit books and book chapters, you will select the "Edit Books" button.



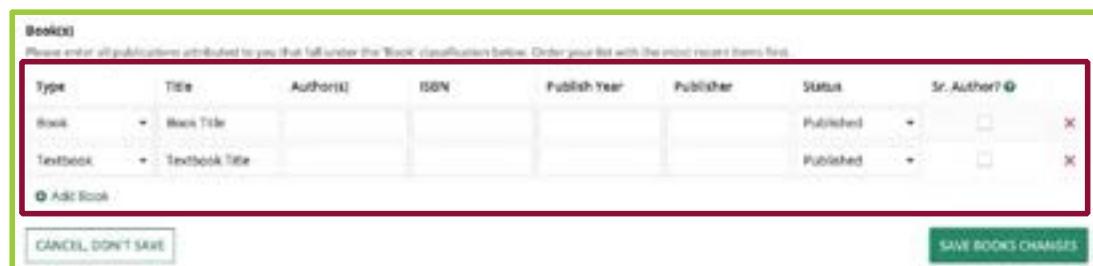
Faculty History Tutorial



Then click the “Add book” link.

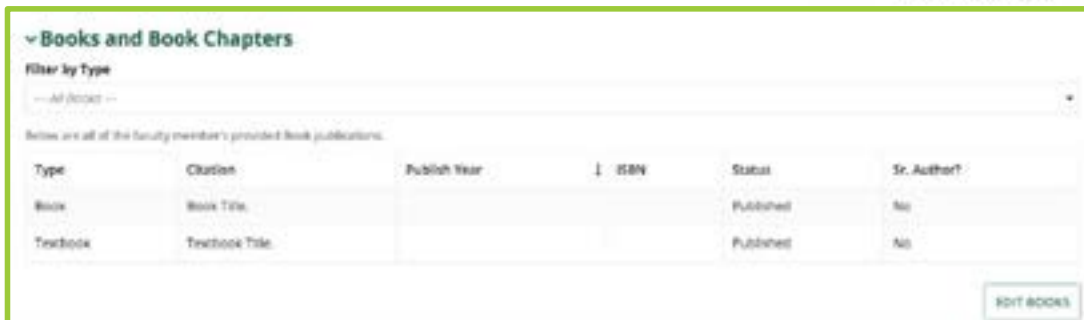


In this section, you can begin by providing information about any books or book chapters you have written or are currently writing. To add an entry, you must select the Type, enter a Title and select Status. All other fields are optional. If you are the Senior Author, indicate that by checking the box. When you are finished adding books, save to return to the main window.



Now that you have added books, you will notice there is a filter tool for you to view specific types of publications.

Faculty History Tutorial



Books and Book Chapters

Filter by Type
-- All books --

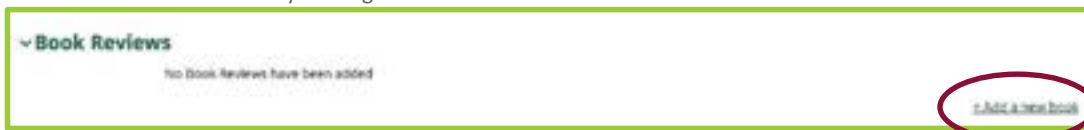
Below are all of the faculty member's provided book publications.

Type	Citation	Publish Year	ISBN	Status	Sr. Author?
Book	Book Title			Published	No
Textbook	Textbook Title			Published	No

EDIT BOOKS

Book Reviews

Book Reviews can be added by clicking "Add a new book".



Book Reviews

No Book Reviews have been added

+ Add a new book

Articles

To add Articles, you have two options, you can either add a new article manually or add articles directly from Academic Analytics.

To add Articles manually, select Add a new article.



Articles

Filter by Type
-- Select a value --

Filter by Year
-- Select a Year --

In addition to the above filters, you can further sort the articles grid by each individual column such as 'Type', by clicking on the column header.

No Articles have been added

+ Add a new article

ADD ARTICLES FROM ACADEMIC ANALYTICS

Then input the article information.



Faculty History Tutorial

Please be sure to add all the required fields before saving.

Title *

Journal *

Author(s) @

Vol. **Issue** **First pg.** **Last pg.** **Publish Year *** **# Citations**

Publisher **International? @** **Community Engaged?** **Sr. Author? @**

Referred? * **DOI @** **ISSN_F @** **ISSN_I @** **Status ***

Yes
 No

Comments

Please limit comments to 200 characters.

To add an article from Academic Analytics, select the button then select the article(s).

Articles

Available Article Publication(s)

Please select any of your existing publications from the table below that you would like to add to your Faculty Record, and then click "Add". Note: only the articles selected on a given page can be added at a time.

<input type="checkbox"/> Citation	Year	International?	Community Engaged?	Comments
Worlds, Worlds... (Journal: Health Affairs (Millersville, Thomas) (2017))	2017	No	No	
Worlds, Worlds... (Journal: Health Affairs (Millersville, Thomas) (2017))	2017	No	No	
Worlds, Worlds... (Journal: Health Affairs (Millersville, Thomas) (2017))	2017	No	No	
<input checked="" type="checkbox"/> World's Worlds... (Journal: Health Affairs (Millersville, Thomas) (2017))	2017	No	No	

Select Add, scroll down and either save or edit as needed.

Faculty History Tutorial

UNIVERSITY OF SOUTH FLORIDA
Office of Decision Support

<input checked="" type="checkbox"/>	Lee, Frank A.; Gilbert, Martin J.; Hines, Bruce; Berglund, William; Thomas, Thomas; ... 2016	No	No
<input type="checkbox"/>	Smith, Brent L.; ... 2016	No	No

1 - 2 of 2 >

ADD

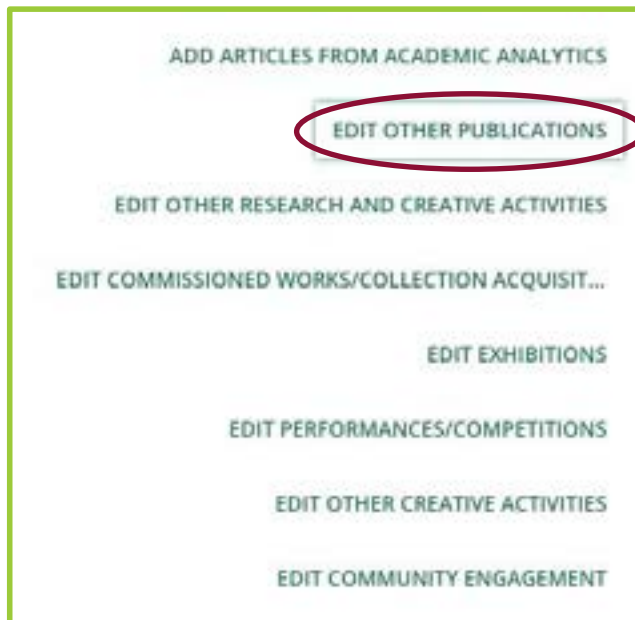
Once added, just like books, you can filter and see only certain types of published articles.

When you are finished adding articles, click save or cancel to return to the main window.

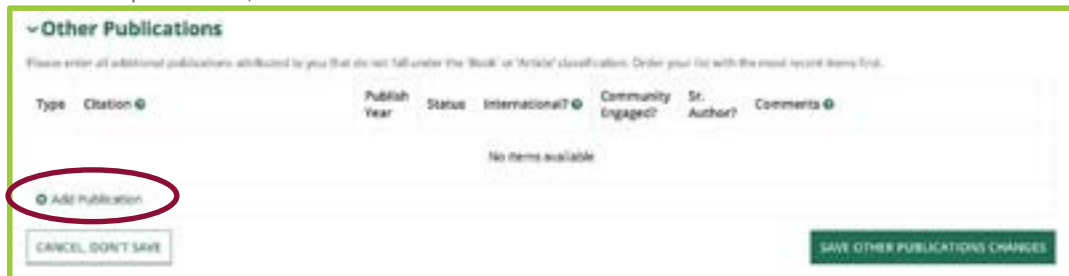
Faculty History Tutorial

Other Publications

What about those publications that fall outside the classification of books or articles? You can add these into Other Publications.



To edit other publications, select the “Edit Other Publications” button and then select “Add Publication”.



In addition to publications, you can add information about Research and Creative Activities, Commissioned Works/Collection Acquisitions, Exhibitions, Performances, Other Creative Activities, and Community Engagement in the same way - you have an edit button to edit the fields and then save.

Grants and Contracts

Similar to other areas in your faculty history, Grants and Contracts can be pulled in directly from FAST, by selecting Choose Directed Grants from FAST. You can also add them manually by clicking Add Directed Grant Manually.

Faculty History Tutorial



Grants and Contracts - Directed

Below are all of the directed grants associated with the faculty over their time at USF. This grant data pulls from RACD.

Begin Date	End Date	Title	Type of Grant	Purpose of Grant	Sponsor	Agency	Total Amount Funded	Candidate's Share of Funds	Role	Other Team Members
No items available.										

ADD DIRECTED GRANT MANUALLY
CHOOSE DIRECTED GRANTS FROM FAST

You can also add information about Grants and Contracts that are currently under review or those that you have applied for but were not selected.

Grants and Contracts - Under Review / Applied but Not Selected

No grants and contracts that are "currently under review" or "applied but not selected" have been added.

EDIT GRANTS - PENDING

Patents and Licenses

You can add any Patents or a Licenses you have in the Patents and Licenses section.

Patents and Licenses

Below are all the faculty member's patents and licenses.

Patent Title	Patent Number	Application Date	Applicant List	Filed	Licensed?	Generates Income?	International?	Community Engaged?
No patents or licenses to display.								

+ Add New Patent or License

Presentations

The last section provides an area to enter Presentations that you have done. Click Add Paper or Speech, enter the information and be sure to press save.

Presentations

Please list, beginning with the most recent, in each category, your presentations of papers or major speeches.

Type	Title	Author(s)	Date	Description	International?	Community Engaged?	Invited?	Lead?	Refereed?
Order a Paper			month		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Add Paper or Speech

CANCEL, DON'T SAVE SAVE PRESENTATIONS CHANGES



Faculty History Tutorial

Service & Supplemental

Service

Now let's look at adding Service. To add service items, select "Edit Service" followed by "Add Service".

My Faculty History
Some of the information contained below will be used within Faculty evaluations and applications. It's important to keep the below information up to date.

Experience & Education Teaching Research and Creative Activity **Service** Supplemental Materials

EDIT SERVICE GOALS
EDIT SERVICE

Service

Type	Role/Position	Office/Organization	Level Type	Chairperson?	Start Date	End Date	Description
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Add Service CANCEL, DON'T SAVE SAVE CHANGES

Select the type and input all other information. Note that if it is ongoing, you will leave the end date blank. Additionally, you have the ability to sort based on type, role, start date, or any of the column header titles. Save your changes when you have finished entering your information.

Supplemental Materials

Finally, The Supplemental Materials area is a repository for any additional documentation. You upload documents by selecting "Manage Files" in the upper right and then selecting "Upload".

Service

Note: A blank end date indicates that the item is ongoing.

Type	Role/Position	Office/Organization	Level Type	Chairperson?	Start Date	End Date	Description
Community	Role1	USF	Local	--	3/2/2018		Ongoing
Professional	Role2	USF	Regional	--	12/5/2018		Ongoing
University	Role3	USF	Regional	--	12/5/2018		Ongoing
Other	Role4	USF	Local	--	12/5/2018		Ongoing
College Service	Role5	USF	Regional	--	12/5/2018		Ongoing

1 - 5 of 5 >

EDIT SERVICE

Faculty History Tutorial



You can upload a variety of formats including Microsoft word, PDF, or images, but keep in mind that there is a 50 megabyte limit per file. For additional information please see the help section in the Canvas course.

Faculty Governance and Processes

Academic and Student Success: Session II
Principles & Processes

Dwayne Smith & Jim Garey

January 16, 2020



UNIVERSITY of
SOUTH FLORIDA

College, School and Department Governance

- Units that will continue to operate on a single campus in a College that is single campus should need only minimal changes.
- Departments or Schools that will continue to operate on a single campus but are in a multi-campus College will need to accommodate changes associated with a multi-campus presence.
- Department or Schools with a multi-campus presence will need to modify governance documents extensively to accommodate and include faculty from other campuses into their departmental structure and processes.

2

College, School and Department Governance

Revising Governance Documents

- College, School, Department level will likely need revision if they become a multi-campus academic unit.
- Consistent with USF UFF Collective Bargaining Agreement and USF Policies.
- College documents sent to Provost's office (mhershberger@usf.edu) by February 28th. Expect 10 more days for approval in an interactive process.
- Department/School documents due April 8th.

3

College, School and Department Governance

List of things to include in governance documents:

- Definitions, rights and responsibilities of different faculty types.
- Chair/Director eligibility, selection, term, roles, relationships, responsibilities and evaluation.
- Other Administrative positions: e.g. Associate Chair, Campus Chair, Undergraduate/Graduate Program Directors.
- Standing Committees: names, roles, guidelines, responsibilities, membership, eligibility etc.
- Faculty Advisory or Evaluation Committee: usually elected committee for annual evaluations, note CBA guidelines need to be followed. In some units this committee handles T&P. There may be other roles for this committee.

4



College, School and Department Governance

- Curriculum Committees
- Tenure and Promotion Committee
 - Mid-tenure and Promotion
 - Two models:
 - Committee of the Whole
 - Fixed number of faculty serves on the committee, usually elected.
- New or Ad-Hoc committees: formation and processes
- Faculty meetings and voting policies: Frequency and notice of meetings, agendas, quorums, voting processes and eligibility, proxies, secret ballots and rules of order.
- Processes: e.g. Faculty and Staff search process; joint, affiliate, courtesy and adjunct processes, relationships to home college, processes related to multi-campus status, other items.
- Amending the Document

5

Faculty Tenure and Promotion

- Note: new consolidated USF T&P begins July 1, 2020.
- T&P document should be a stand-alone document. Do not include in Governance or other documents.
- Revised College Guidelines submitted to Provost's office no later than February 28th, 2020 (mhershberger@usf.edu). Expect 10 day turnaround in an interactive process.
- Once College documents are approved, school and departmental guidelines are due no later than April 8th. Again expect a 10 day turnaround in an interactive process.
- Faculty votes approving documents by the end of the Spring 2020 semester.
- The Provost's office will consult with the UFF and if they approve, new guidelines can go into effect July 1, 2020; otherwise July 1, 2021.

6

Faculty Tenure and Promotion

Note that the amount of revision required will depend on multi-campus status of your unit as with Governance documents.

Main difference for faculty at the Sarasota/Manatee and St. Petersburg campuses are the criteria used:

- USFT: Excellence in scholarly and academic achievement – the new consolidated USF uses this definition.
- USFSM & USFSP: still use the annual evaluation criteria, e.g. Outstanding, Strong Satisfactory etc.

7

Faculty Tenure and Promotion

Some faculty at regional campuses may go up for tenure using older regional guidelines (generally those with three years of tenure earning credit on July 1, 2019 –e.g. hired Fall 2016 or earlier).

- In these cases the new consolidated academic unit's T&P committee and administration will simply substitute the old guidelines for their analysis and deliberations.

A major emphasis will be that the assignment and research infrastructure available to regional faculty prior to consolidation needs to be taken into account in upcoming tenure and promotion decisions.

8



Faculty Tenure and Promotion

T&P review initiated in department, go through the department committee, chair, school committee where appropriate to College Committee to the Dean (with input from Regional Chancellor as appropriate) and then to the Provost, President and BOT.

PROCESS FOR PROMOTION AND TENURE REVIEWS OF FACULTY ON BRANCH CAMPUSES



9

Faculty Tenure and Promotion

- T&P Process will utilize the Archivum Faculty Information System (FIS) in most cases. The system will accommodate input from Campus Deans and Campus Chairs.
- Branch Campus faculty going up for T&P using older regional guidelines will need to use the old paper system since the old criteria of Outstanding/Strong etc. cannot be accommodated by the FIS.
- USF Health is in the process of switching to FIS.
- See <https://usflearn.instructure.com/enroll/GGFXX4> for the Canvas course to learn about the FIS.

10

Faculty Searches and Hiring on Regional Campuses

- Regional Chancellors assess future faculty hiring needs.
- Hiring plans developed in collaboration with Campus and College Deans.
- Plans are presented to the Provost for approval, funding, and implementation.
- Recruitment is by university wide unit.
- For regional faculty hires, hiring responsibilities can be delegated by the Provost to chairs, directors, campus assistant/associate deans at any USF campus.
- The regional chancellor or designee will be serve as a voting member on search committees for branch campuses.
- Faculty appointments approved by College Dean and Provost. If consensus is not reached, Provost adjudicates.

11

Faculty Classification and Appointments

Proposed changing faculty titles and job codes. – still need vetting and negotiation with UFF.

- Goal is less confusion in job codes – e.g. different job codes for tenure track and non-tenure track (currently they have the same code, but different attribute).
- Professor 9001, Associate Professor 9002, Assistant Professor 9003.
 - No change except these are only used for tenured/tenure track appointments
- Distinguished University Professor 9007
 - To be used for all DUPs designated at the University-wide level.
- Eminent Scholar 9009
 - To be retired but will maintain existing faculty in this code.

12

Faculty Classification and Appointments

Non-Tenure track positions new to the USF-UFF CBA, need codes.

- Lecturer, Senior Lecturer and Master Lecturer
 - Will replace existing Instructor I, II, and III.
- Professor of Practice, Associate Professor of Practice, Assistant Professor of Practice
 - Non-tenure track, terminal degree, relevance to practice or clinical setting.
- Research Professor, Associate Research Professor, Assistant Research Professor
 - Non-tenure track, currently exist.

13

Faculty Classification and Appointments

Titles from the USF-UFF CBA proposed to be eliminated:

- Instructor 9004
- Graduate Research Professor 9006
- Distinguished Service Professor 9007
- Eminent Scholar
- University School Professor 9016, University School Associate Professor 9017, University School Assistant Professor 9018
- Instructor Librarian 9056
- Staff Physicist 9153
- Counselor/Advisor 9173
- Instructional Specialist 9178
- Specialist, Computer Research 9334
- Coordinator, Cooperative Education 9394
- Specialist, Music 9433
- Resident Advisor to Students 9435
- Psychiatrist 9460, Physician 9462, Physician's Assistant 9464
- Dentist 9490, Specialist, Student Counseling 9495

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Faculty Classification and Appointments

Titles from the USF-UFF CBA proposed to remain the same:

- Professor 9001, Associate Professor 9002, Assistant Professor 9003
- University Librarian 9053, Associate University Librarian 9054, Assistant University Librarian 9055
- Coordinator 9115
- Associate in _____ 9120, Assistant in _____ 9121
- Program Director 9126
- Curator 9150, Associate Curator 9151, Assistant Curator 9152
- Scholar/Scientist/Engineer 9160, Associate Scholar/Scientist/Engineer 9161, Assistant Scholar/Scientist/Engineer 9162
- Research Associate 9166
- Specialist, Computer Research 9334
- Psychologist 9434

15

Faculty Classification and Appointments

- Joint Appointments
 - Two academic units contribute appointments and pay to a faculty member.
 - One unit should be designated as primary department. Need clear expectations.
- Adjunct Codes
 - Adjunct, In-Unit
 - Adjunct, Out of Unit
 - Adjunct, USF Health
- Visiting Faculty – limited to 3 or possibly 4 years
- Courtesy Faculty – do not hold primary appointment at USF
- Affiliate Faculty – hold primary appointment in one USF unit but have another (typically unpaid in secondary appt.– see Joint Appt. above).

16

Faculty Assignment

Determining default academic home of consolidated USF Faculty

- College Deans prepare rosters to Provost's office no later than February 14th, 2020 (rlopez@usf.edu).

Criteria to use when home unit is unclear:

1. Current (pre-consolidation) appointment
2. Current and recent assignments
3. Current (pre-consolidation) appointment
4. Terminal Degree
5. Current and recent teaching and scholarship activity
6. Consultation with other Deans for some multidisciplinary faculty

Faculty must be notified as soon as possible but no later than Feb. 15, 2020.

17

Faculty Assignment

Changing home academic unit of faculty members

- Usually it will be clear where faculty belong, but a limited number of faculty may request, on a one time basis during a limited window of time (February 17, 2020 – April 3, 2020) to be appointed to a different (preferred) unit.
- There is a two page form requiring approval from both academic units.
- Criteria
 - The fit of the appointment to the requested unit
 - The impact on both the default and preferred units
 - Approval of the transfer by the faculty in the preferred unit
 - Approvals by upper administration of the default and preferred units
 - Agreement between units regarding any financial considerations
- The approved and signed application should be sent to the Provost's Office (rlopez@usf.edu) no later than April 3, 2020)

18

Faculty Assignment

Changing the Home Campus of Faculty

Regulated by article 9.5 of the UFF Collective Bargaining Agreement

1. If the administration desires to move a faculty member to a different principal place of employment they must provide at least 9 months notice and the faculty member may request a conference with their supervisor to express any concerns. Voluntary changes shall be considered prior to involuntary changes if practicable.
2. If a faculty member desires to move to a different principal place of employment, they would need to consult with their College Dean. Their College Dean is under no obligation to grant a change, but may do so at their discretion.

19

Faculty Assignment

Cross Campus/College/Department Assignment of Faculty

- Regulated by article 9.5B of UFF Collective Bargaining Agreement
- Secondary place of employment is a location at least 15 miles from their principal place of employment (e.g. home campus).
 - 90 day notice and right to a conference to express concerns
 - If secondary assignment is made within a regular home campus appointment they should have their assignment adjusted to reflect the travel time and be reimbursed of necessary travel expenses at State rates.
- If Secondary employment is to another academic unit that does not require travel, the assignment can be made at the discretion of the two Deans, Directors or Chairs. Probably best for instructors and tenured faculty. If applied to untenured assistant professors, there should be consideration as to how the split assignment might affect future tenure prospects.

20



Faculty Assignment Process

- Use the Faculty Information System (FIS) beginning Spring 2020 for assignments in the 2020-21 Academic year.
<https://usflearn.instructure.com/enroll/GGFXXK4>
- This is an interactive process that meets the requirements of the UFF Collective Bargaining Agreement (CBA) in providing consultation with faculty members.
- Although the CBA requires 6 weeks notice, assignments are generally made in the Spring for the following academic year.
- Faculty have the right to dispute assignments through the CBA.

21

Faculty Assignment Process

Categories of Assignment include:

- Teaching- formal courses, course development, class preparation, grading and mentoring graduate and undergraduate researchers.
- Research-
 - Funded – must have C&G salary to be in this classification
 - Departmental – typical unfunded but a grant that pays things other than salary would be considered departmental research rather than funded research
 - Creative Activities
- Service- activities that promote the university, profession or community outside of research.
- Administration – supervising other faculty, staff or students
- Clinical – faculty with clinical job duties requiring a medically related license
- Other – used for professional leave and release time for UFF activities

22

Faculty Assignment

- Assignments must be equitable within an academic unit regardless of geographic location of the faculty member.
- Branch faculty teaching loads may need to be reduced for equitability.
- Use a holistic approach in how teaching needs can be distributed across existing faculty to minimize the need for new hires.
- Note that assignment parameters are being standardized to some extent across all academic units of the University.
- State mandates no more than 25% assignment for a 3 credit course (8.133% per credit hour). You might assign 25% to someone teaching a large course they have never taught before but assign less than 25% to someone teaching a small course they have taught before.

23

Faculty Assignment

- Relationship between Assignment and Effort Reporting:
- Assignment estimates or predicts what a faculty member will do.
- AFD-FAR reports details of what was actual done after the year is over (Using a FAIR module)
- Effort percentages for externally funded federal research reported to the State and Federal Government (PERT) must be equivalent.

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Faculty Assignment

Tenured and Tenure Track Assignments

- Research Active faculty should approach 50% research assignments
- Service assignments should be in the 5-10% range unless there are extraordinary circumstances.

Lecturer Assignment

- Typically a 4/4 teaching assignment, with 95% teaching, 5% service.

Adjunct Assignment

- Hired on a part-time basis to teach specific courses on a semester by semester contract.

Faculty Assignment in Detail

There is a document in the faculty assignment section that provides greater detail about the ins and outs of faculty assignment and how it relates to state law and the UFF Collective Bargaining Agreement.

Guiding Principles

- Aligns with USF's mission as research intensive, preeminent, R1 university;
- Provides fair and equitable opportunities to applicable faculty members to progress toward meeting the criteria and standards for promotion and tenure;
- Is consistent with the faculty member's qualifications; experience, including professional growth and development; and preferences, to the extent practicable;
- Provides fair and equitable opportunities to fulfill any applicable criteria for merit salary increases;
- Considers the needs of the program or department/units;
- Meets the minimum full academic assignment in terms of 12 contact hours of instruction or equivalent assignments in research and service (and, if applicable, clinical and/or administrative assignments).

Faculty Assignment in Detail

General Category	Sub-Categories
Teaching/Instruction	Undergraduate Organized Sections
	Undergraduate Individual Instruction
	Graduate Organized Sections
	Graduate Individual Instruction
	Other Instructional Effort
	Academic Advising
	MCOM – Medical Student Instruction
	MCOM – House staff Instruction
	MCOM – Health Professional Instruction
Research	Department Research
	Sponsored Research
	Creative Activity
Service	Professional & Public Service
	University Governance
Administration	Academic Administration
Clinical ¹	Paid Patient Care
	Clinical Service (Non-Reimbursable)

¹ Only used by those with clinical licenses providing patient care

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Faculty Assignment in Detail

Typical Assignments for Tenured/Tenure Track Faculty:

Category	Tenure-Earning	Tenured - Research Productive	Tenured - Not Research Productive	Instructional (Not TT)	Research (Not TT)	Clinical (Not TT)
Teaching	0-50%	0-50%	75-95%	90-95%	0-5%	See USF Health Guidelines
Research	40-95%	40-95%	0-20%	0-5%	90-95%	
Service	5-10%	5-10%	5-10%	0-10%	0-10%	

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Faculty Assignment in Detail

Typical Assignments for Non-Tenure Track Faculty:

Course In-Load	Teaching	Research	Service
4/4	90-95%	0%	5-10%
4/3	79%	11-16%	5-10%
3/3	68%	23-28%	5-10%
3/2	56%	34-39%	5-10%
2/2	45%	45-50%	5-10%
2/1	34%	56-61%	5-10%
1/1	23%	68-73%	5-10%
1/0	11%	79-84%	5-10%
0/0	0%	90-95%	5-10%

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Faculty Performance Appraisal

ANNUAL ASSIGNMENT AND PERFORMANCE APPRAISAL FOR ALL FACULTY ON BRANCH CAMPUSES

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    graph LR
      A["ANNUAL ASSIGNMENT AND ASSURANCE OF EQUITY AND CONSISTENCY OF SUPPORT FOR FACULTY  
College Deans/School Directors/Department Chairs and Branch Campus Leadership Designees"] --> B["ANNUAL PERFORMANCE APPRAISAL WILL BE CONDUCTED BY UNIT SUPERVISOR (E.G. DEPARTMENT CHAIR/CONTROL DIRECTOR) WITH FORMAL WRITTEN INPUT FROM REGIONAL CHANCELLORS OR BRANCH CAMPUS LEADERSHIP DESIGNIES  
Departmental Chairs/School Directors/Campus Deans and Regional Chancellors"]
      B --> C["ANNUAL PERFORMANCE APPRAISAL FOR ALL FACULTY WILL BE REVIEWED/COMPLETED BY THE COLLEGE DEAN OR DESIGNEE  
College Deans or Designees"]
    
```

30

Faculty Performance Appraisal

Regulated by the UFF Collective Bargaining Agreement

1. Faculty need to be evaluated at least once annually except if they have received a notice of non-reappointment.
2. Information used in preparing evaluations comes from their immediate supervisor, peers, students, themselves, other university supervisors and individuals responsible in service assignments.
3. Any classroom visits/observations related to annual evaluations must be noticed at least 2 weeks prior to the visit and the date agreed upon by the observed faculty member.
4. The written evaluation must include the faculty member's annual assignment.
5. Each academic department/school develops and maintains its own evaluation processes. A majority of a quorum of unit faculty must approve the processes. These processes must be made available to all faculty in the unit. See the section on Governance Documents

31

Faculty Performance Appraisal

6. The Criteria for annual evaluations are outlined in Article 10.4 of the USF UFF Collective Bargaining Agreement (<https://www.usf.edu/hr/documents/employment-resources/employee-labor-relations/uffcollective-bargaining-agreement.pdf>) and summarized below:
 - a. Teaching effectiveness
 - b. Contribution to the discovery of new knowledge
 - c. Public Service
 - d. Participation in governance processes
 - e. Other assigned duties
7. Faculty teaching in a classroom are required to be proficient in the English language.
8. The department/unit must maintain a single evaluation file containing all the documents used in the evaluation process. Faculty may examine their evaluation files if they wish. This file may not contain anonymous material other than student evaluations. All student evaluation comments must be included in the evaluation file. In the past these files have been maintained in the FAIR system but USF is currently switching to the Archivum Faculty Information System (FIS).

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Faculty Performance Appraisal

- USF Academic Affairs has transitioned to using the Faculty Information System (FIS) for faculty annual evaluations.
- All Academic Affairs units on the Tampa campus will use FIS for 2019 annual evaluations.
- Branch Campuses have the option of using FAIR or FIS for 2019 annual evaluations.
- USF Health is currently transitioning to the use of FIS for annual evaluations.

33

Faculty Performance Appraisal

Post Tenure Review

- Post tenure review is also known as Sustained Performance Evaluation. There is a specific process described in the USF UFF Collective Bargaining Agreement.
- In summary, the process is carried out every seven years according to a departmental/unit process approved by an elected group of departmental/unit faculty.
- If a faculty member has received at least Satisfactory annual evaluations in the previous 6 years they cannot be rated less than Satisfactory in the Post Tenure Review.
- If a faculty member's sustained performance is consistently below satisfactory in one or more areas, a performance improvement plan shall be developed by the faculty member in concert with his/her supervisor.

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Faculty Information

Faculty Handbook

As of January 17, 2020, the University of South Florida Faculty Handbook will reflect the projected consolidated status of the university. However, it should be considered a de facto *draft* version until consolidation formally occurs in July 2020, at which time appropriate governance and administrative bodies can engage in a more comprehensive revision.

New Faculty Orientation

The first group of new faculty members to join the consolidated University of South Florida will begin their employment (with a possible few exceptions) on August 7, 2020. A New Faculty Orientation program will be developed that encompasses all of these new faculty, regardless of their campus assignment. The projected dates for the new faculty orientation are **August 10-13, 2020**, to be held on the University of South Florida Tampa campus.

35



Faculty Information System

Academic and Student Success Consolidation: Session II

Terry Chisolm | January 16, 2020

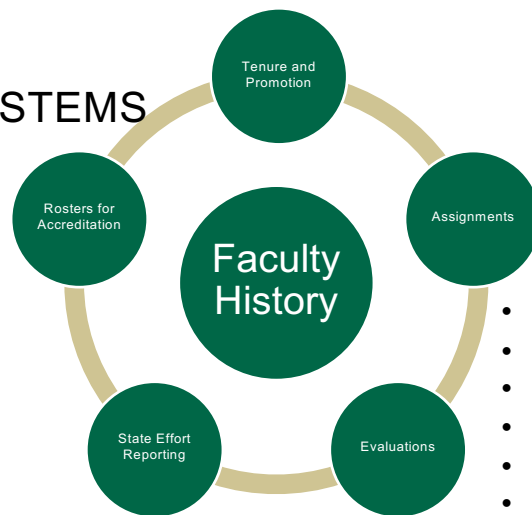


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Faculty Information System (FIS)

SYSTEM OF SYSTEMS

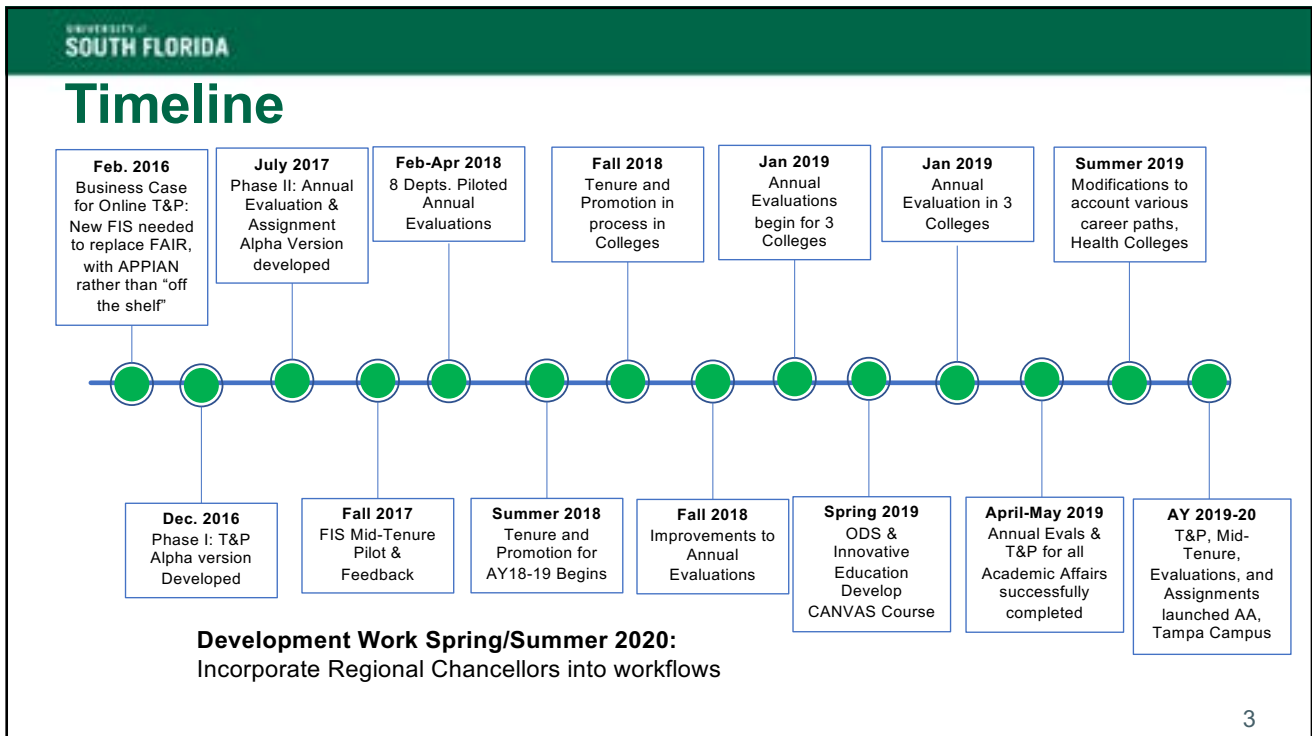
Built on the
ARCHIVUM PLATFORM



- GEMS
- BANNER
- EXPLORANCE BLUE
- ACADEMIC ANALYTICS
- FAST (Grant Awards)
- BOX (Uploads)

2

Presentations Academic & Student Success Session 2



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Next Steps: Faculty complete Faculty History

Welcome to MyUSF

EMPLOY | LEARNING & TEACHING TOOLS | **ACADEMICS** | MY RESOURCES | RESEARCH MYUSF | ABOUT

Academics

NEWS

FAST

Faculty Core

Faculty History

4

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Faculty History

- Central to FIS
- Digital portfolio
- Faculty can begin working on it now
 - Feeds Annual Evaluation
 - Feeds Tenure and Promotion
 - Minimizes future work

5

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Faculty Portal

6

Faculty History



7

Next Steps: Faculty, Chairs, Deans, Staff register in Canvas Course



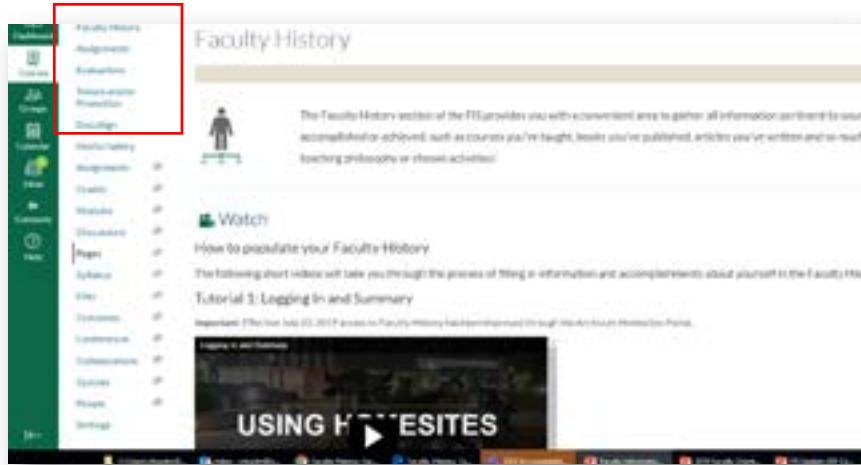
Self enroll in Canvas via: <https://usflearn.instructure.com/enroll/GGFXK4>

8



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Tutorials



9

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Support with FIS

- For **technical questions** contact the USF Information Technology Help Desk at 974-1222 (<https://www.usf.edu/it/about-us/helpdesk.aspx> (Links to an external site.)). This includes login, browser issues, or if you have issues accessing anything within the training.
- For **procedural questions** please contact your College/Department Representative (Liaison). This includes questions related to your Faculty History, Annual Assignments, Evaluation Process, and Tenure & Promotion.
- For unresolved questions or to request unit level training please contact the **Office of Decision Support** at facultyhelp@usf.edu.

10

Presentations Academic & Student Success Session 2



Faculty Success

*Faculty Support Services and
Professional Development*

Dwayne Smith & Cynthia DeLuca, January 16, 2020



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Faculty Success

“Faculty, and staff, are the lifeblood of any preeminent global research university such as USF. The strategic success of the institution is closely linked to the success of its faculty members.”

(Faculty Success Strategic Initiative Workgroup. Final Progress Report, December 15, 2019, p. 6)

2

Faculty Success – Recommendations

Establishing an Office of Faculty Success at USF, through a consolidation of existing personnel and operations.

This Office will focus on:

Structure and Culture

Recruitment and Retention

Classification and Assessment

Infrastructure, Partnership, and Support

3

Faculty Development – Teaching & Learning

Workshops, events, training, and on-demand help in support of teaching & learning.

USFSM: eLearning Services

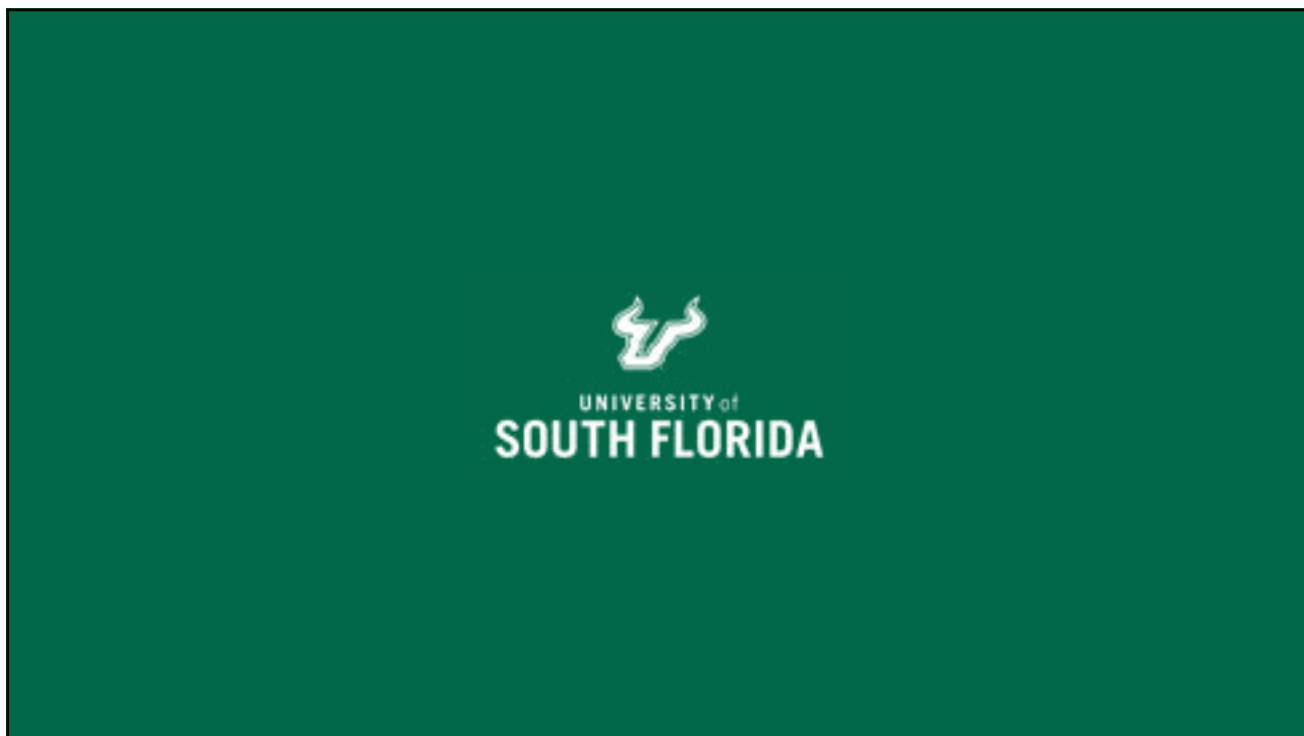
USFSP: Center for Innovative Teaching and Learning (CITL) and
Online Learning and Instructional Technology Services (OLITS)

USFT: Academy for Teaching & Learning Excellence (ATLE) and
Innovative Education (Digital Learning)

4



Presentations Academic & Student Success Session 2



USF Research & Innovation

Faculty Support Services

Keith Anderson January 16, 2020



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Sponsored Research

- Organized in teams of subject matter experts, Sponsored Research offers services throughout the research lifecycle - before, during, and after your sponsored award:
- Our Proposal Services (Pre-Award) Team
 - Assist with the identification of funding opportunities.
 - Manages Electronic Research Services, such as Grants.gov and NSF Fastlane.
 - Assist with the development, preparation, and submission of proposals.
 - Coordinates interest in funding opportunities for limited submissions.
 - Identifies and coordinates regulatory and compliance requirements.
 - Negotiates and accepts awards on behalf of the university.
 - Serves as a liaison for requests and engagement with your funding agency.

2



Sponsored Research

- Our Transactions Team
 - Sets up your award in USF's financial system, FAST.
 - Manages budget transfers and exception requests.
 - Coordinates with other central offices such as payroll, travel, and purchasing.
- Our Invoicing and Reporting Team
 - Prepares and submits invoices and financial reports.
 - Coordinates preparation and submission of supporting documentation.
- Our Closeouts and Financial Compliance Team
 - Manages effort reporting.
 - Reviews and processes expenditure transfers.
 - Conducts final financial reconciliation of the award at closeout.
 - Submits required invention statements and property inventory to sponsoring agencies.

3

Sponsored Research

- Our Subcontracting and Subrecipient Monitoring Team
 - Conducts risk assessments of subawardees.
 - Prepares and negotiates subcontracts.
 - Represents the university as members of the Federal Demonstration Partnership.
- Our Data Use Agreements Team
 - Reviews Data Use language in awards and contracts.
 - Engages with requisite offices related to Data Use on behalf of the PI.
- Our Audit and Compliance Team
 - Manages document production requests during the course of an audit.
 - Engages with auditors and sponsors conducting review of awards to USF.

4

Sponsored Research

- Our Information Services Team
 - Develops and supports digital solutions to assist researchers and research administrators.
 - Maintains USF Research's digital infrastructure and online services.
- Our Academy of Certified Research Administrators
 - Provides training and resources in all aspects of research administration.
 - Offers basic and advanced credentialing courses to help you become a Certified Research Administration at the University of South Florida.
 - Provides fact sheets, reference guides, and collection of resources for research administration, our FacultyOne-Stop.

5

Sponsored Research

For additional information, contact lists, and access to our resource materials including the FacultyOne-Stop, visit our website:

[https://www.usf.edu/research-innovation/sr/.](https://www.usf.edu/research-innovation/sr/)

6



Research Integrity & Compliance

Research Integrity & Compliance includes compliance programs, each of which is supported by a program manager and staff. Our programs include:

- Biosafety Program: Incorporates health and safety practices governing all personnel working with biohazardous materials in research and/or teaching activities.
- Boating Safety & Scientific Diving Programs: Provide training, support and oversight of scientific diving and for operators of small vessels used in research.
- Conflict of Interest Program: Protects the integrity of research by ensuring that research-related conflicts of interest are appropriately disclosed and managed.

7

Research Integrity & Compliance

- Export Controls: Navigates complex export control regulations.
- Institutional Review Board (IRB): Provides oversight for human subjects research conducted by faculty, staff and students.
- Institutional Animal Care and Use Committee (IACUC): Provides oversight for all research and teaching activities, including field studies, involving live vertebrate animals.
- Our Applications for Research Compliance (ARC) Help Desk is available to provide technical assistance with the ARC portal, which houses electronic applications for the following programs: Biosafety, COI, IACUC and IRB. The Help Desk team can be reached Monday – Friday from 8:00 am – 5:00 pm at (813) 974-2880 or rsch-arc@usf.edu.

8

Research Integrity & Compliance

For more information and contact information for each program, visit our website: <https://www.usf.edu/research-innovation/research-integrity-compliance/>

9

Technology Transfer Office

Technology Transfer services include:

- Finding industry-sponsored research funding opportunities.
- Protecting your intellectual property (IP) with patents and copyrights.
- Licensing IP to commercial partners who will use it to develop new products.
- Vetting startup ideas and helping you set up a company.
- Performing patent searches, contract review, and SBIR/STTR support.

For more information, visit our website: www.usf.edu/research-innovation/pl/.

10



Office of Corporate Partnerships

The Office of Corporate Partnerships faculty services include:

- Identifying and engaging potential corporate partners for research funding, speaking events, or student mentorship.
- Convening academic-industry meetings and corporate forums in interdisciplinary research areas.
- Reviewing and facilitating industry-focused research proposals.
- Securing industry letters of support for federal grant proposals.
- Facilitating Florida High Tech Corridor Matching Grant funding opportunities.

For more information, please visit our website:

[http://www.research.usf.edu/ocp/.](http://www.research.usf.edu/ocp/)

11

Faculty Honors, Prizes & Awards

The Faculty Honors program Services include:

- Comprehensive interactive website where faculty can explore opportunities, find resources, and contact other award recipients.
- Workshops throughout the year.

Honors, awards, and recognition prizes are available for faculty at every career level.

For more information, please visit our website at

<https://awards.research.usf.edu>.

12

Presentations Academic & Student Success Session 2



Redefining Research Support

The USF Libraries' "Path to ARL" Transforms Support for Faculty and Students

Dean Todd Chavez | January 16, 2020



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Core Collections & Services

- Collections support 200+ degree programs
- Two decade emphasis on acquiring digital content
- 976 databases, 725,522 e-books, 69,719 e-journals plus legacy/print/special collections
- Core services: a) reference assistance, research consultations, librarian embed; b) circulation and reserve; c) ILL and other content delivery services; and d) digitization, digital repository, IP/copyright assistance

2

Presentations Academic & Student Success Session 2

<h2>RESEARCH PLATFORM TEAMS</h2> <p>High-quality service platforms supporting Faculty and Graduate Student success across the institution.</p>	<h3>GRANT SUPPORT</h3> <ul style="list-style-type: none"> Project Management Data Management Broader Impacts Web Design/Support Statistical Analysis (R) 3D/AR/VR Research Customized Metadata Social Media Strategies 	<h3>PUBLISHING</h3> <ul style="list-style-type: none"> Publishing Strategies Open Access Options Impact Management Infographic Design Storyboards/Storymaps Copyright/IP Services Data Preservation Repository Services Publication Design/Layout Social Media Impacts
	<h3>RESEARCH</h3> <ul style="list-style-type: none"> Collections Program Analysis Visualization Services/3D Impact Management Web GIS & Story Journals Drone Operations GIS Research/Analysis Data Management Statistical Analysis 	<h3>TEACHING</h3> <ul style="list-style-type: none"> Course Instruction (SCH) Collection Integration Curriculum Development Digital Technologies Training GIS Workshops Data Analytics Research Methods Transferable Skills

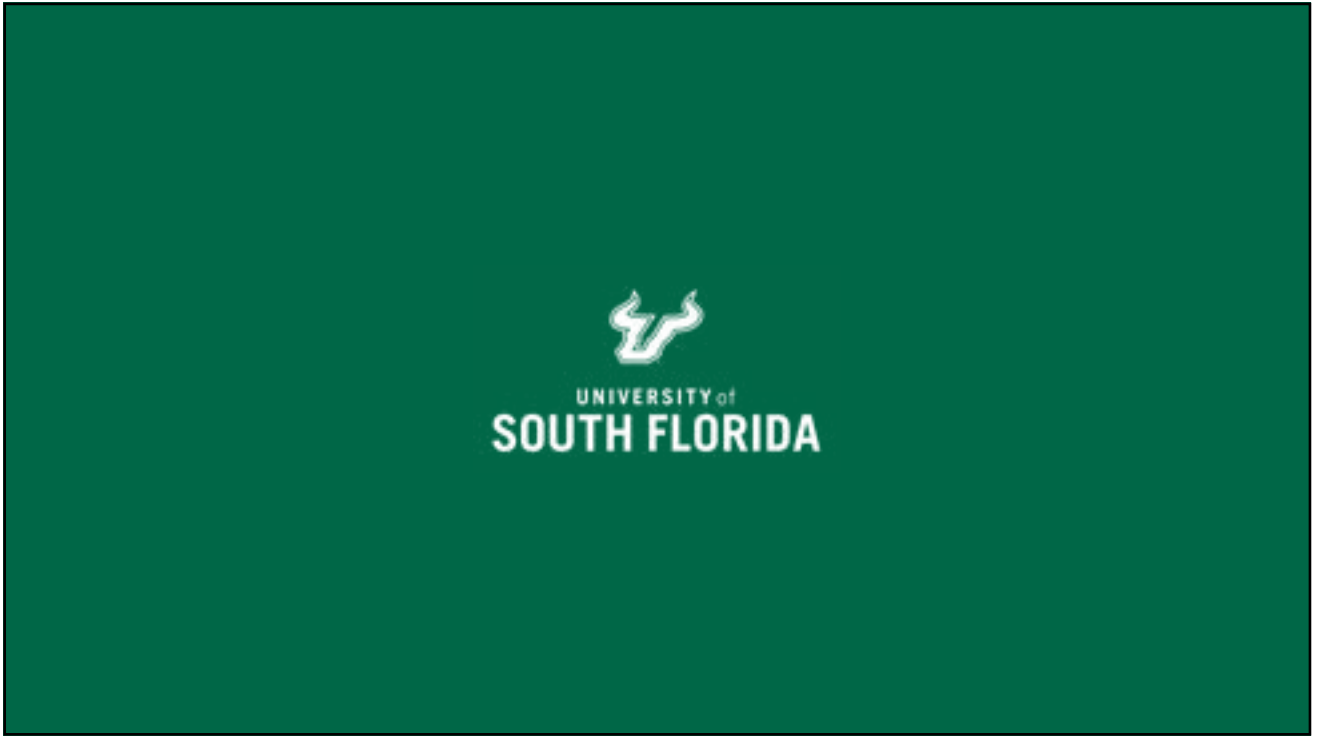
3

Deliverables (Today)

YEAR 1 <ul style="list-style-type: none"> + 2 Research Platform Teams + 4-6 Collections of Distinction + Enhanced Grant Contributions + AR/VR Development + Communication/Marketing + Spatial Analytics 	YEAR 2 <ul style="list-style-type: none"> + 2 Research Platform Teams + 4-6 Collections of Distinction + Enhanced GIS Capacity + Academic Success (Librarian) + Data Management Capacity + Research Programming + Strategic Social Media Program
YEAR 3 <ul style="list-style-type: none"> + 2 Research Platform Teams + 4-6 Collections of Distinction + Faculty Impact Services + Academic Success (Librarian) + Statistical Analysis & Research Design + Curriculum/Collection Integration + Repository Services 	YEAR 4 <ul style="list-style-type: none"> + 2 Research Platform Teams + 6-8 Collections of Distinction + Infographic/Publication Design + Copyediting + Storyboard/Storymap Design + Data Analytics (Spatial) + Digital Technologies Training
YEAR 5 <ul style="list-style-type: none"> + 2 Research Platform Teams + 6-8 Collections of Distinction + Enhanced Spatial Analytics + Copyright/IP Services + Web Services for Grants + Research Drone Capacity + Archives Capacity 	<p style="text-align: center;">FIT FOR ARL MEMBERSHIP IMPROVED AAU PROFILE SOLIDLY PREEMINENT</p>

4

Presentations Academic & Student Success Session 2



Home Campus

Paul Dosal, Vice President for Student Success, January 16, 2020



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Strategic Considerations

- Enhanced mobility across three campuses to take advantage of unique course offerings, services, programs, and events.
- Requirement to deliver equitable access to high quality services and programs on all three campuses
- Deliver the right support, to the right student, at the right time.
- Students need to know where to go to utilize a service

2



Home Campus Practices and Principles

1. Students will select a major and designate a home campus at the point of admissions.
2. Designation facilitates enrollment planning, scheduling, class size, support services, etc.
3. Any USF student should be able to access non-academic services on any campus.
4. Services related to a student's academic major will be determined by the student's home campus.
5. If a student changes majors to a major not available on their home campus, they will change home campus.



Academic Advising

Paul Dosal, Vice President for Student Success, January 16, 2020



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Excellence in Academic Advising initiative

- Task Force will develop a strategic plan to “advance student learning, success, persistence, retention, and degree completion through a comprehensive, standards-based strategic planning process to promote excellence in academic advising” for a consolidated USF.
- Conditions of Excellence: institutional commitment; learning; improvement and the scholarship of advising; organization; equity, inclusion, and diversity; advisor selection and development; collaboration and communication; student purpose and pathways; and technology enabled advising.

2



Hybrid Administrative Model

- At Tampa, advising is decentralized, with advisors embedded in colleges and departments;
- Only Exploratory Majors advised centrally
- At St. Petersburg and Sarasota-Manatee, advising is “centralized” in a one-stop shop

3

Coordination of Advising

- Council of Academic Advisors (CAA) composed of advisors from all three campuses, will play a critical role in the CAA strategic planning process
- CAA provides a forum for the deliberation and resolution of any academic advising concerns related to consolidation
- Assistant Dean of Advising and Analytics (ADAA), Dr. Melissa Irvin, provides any needed support, coordination and collaboration for advising-related activities within and between USF campuses

4

Communication and Collaboration in one USF

- Undergraduate students can schedule appointments with any advisor regardless of the student's campus or major.
- Advisors can schedule or transfer undergraduate advising appointments to other advisors regardless of campus or college.
- Archivum notes, referrals and cases are visible to advising users regardless of the student's or advisor's campus location.
- Students can request virtual appointments.
- DegreeWorks audits are accessible and visible to any advisor for all undergraduate students regardless of campus.

5

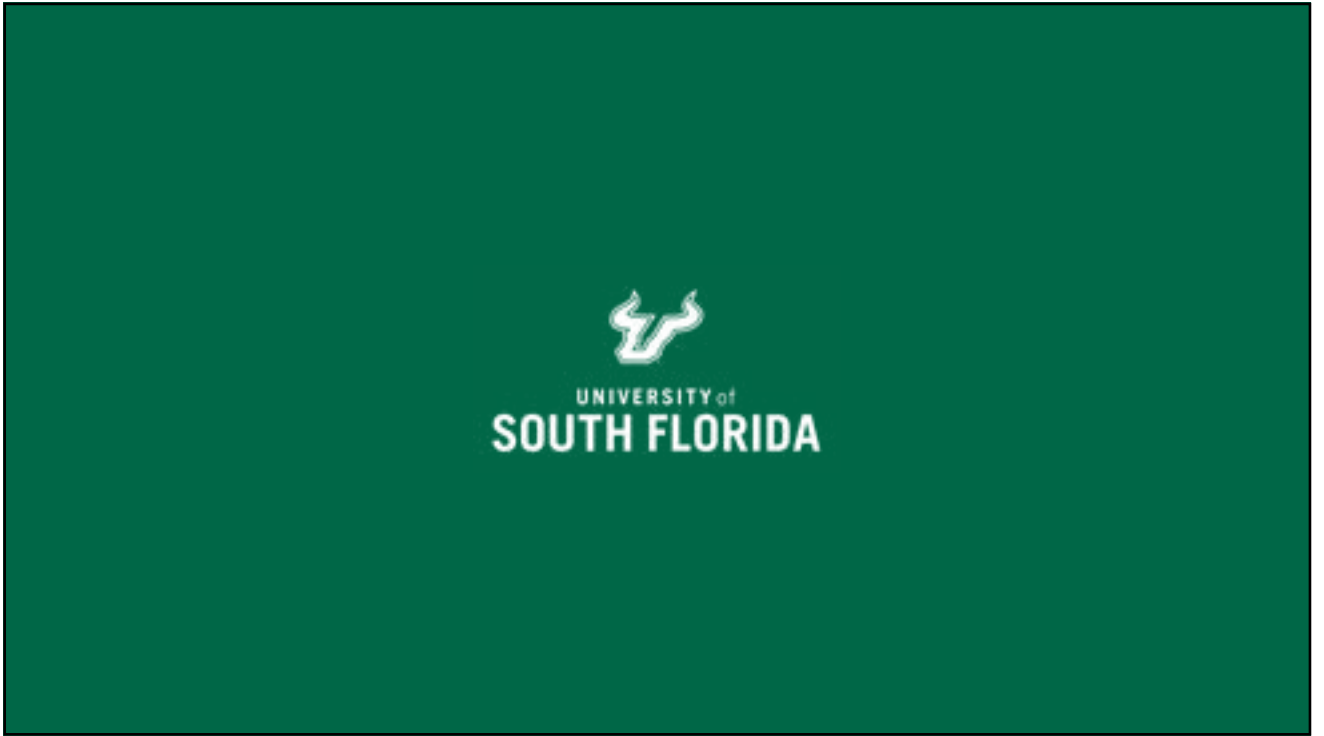
Accountability in one USF

- Student Success leads (Vice Chancellor or Vice Provost) at the branch campus will have the authority and responsibility over the delivery of academic advising.
- They to and be held accountable by the Vice President for Student Success and/or the Provost.
- EAA strategic plan will drive the future organization and delivery of academic advising services.

6



Presentations Academic & Student Success Session 2



Mental Health Counseling

Paul Dosal, Vice President for Student Success, January 16, 2020



UNIVERSITY of
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MWell4Success

- Each campus is implementing this systems-thinking and public health-based approach to enhance our capacity to meet the mental health needs of our students.
- Three-tiered approach: universal, targeted, and intensive care.

2

Counseling in One USF

- Students will have access to mental health resources on any campus
- Distance between campuses might make it difficult for students to travel to other campuses for counseling services
- Expect students to first seek services on their designated home campus.
- In the rare event that a student seeks services elsewhere, coordination and communication between the teams on each campus should facilitate the coordination of care management.

3

Administration of Counseling Services

- Director of the Counseling Center in Tampa, Scott Strader, will continue to report to the Executive Director of Student Health Services, Dr. Joe Puccio
- Director of the Counseling Center in St. Petersburg, Anita Sahgal, reports to the Regional Vice Chancellor of Student Success on the St. Petersburg campus, Dr. Patti Helton
- At Sarasota-Manatee, counseling services are provided to students by contract with New College. The Vice Provost at Sarasota-Manatee, Brett Kemker, responsible for ensuring equitable access to services on that campus.

4

Behavioral Intervention Teams

- Case Management of students of concern
- Operate on all three campuses
- Activities are coordinated through Simplicity, a case management tool that allows for referrals across all campuses.



Office of Financial Aid (OFA)

Paul Dosal, Vice President for Student Success, January 16, 2020



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Financial Aid

- Currently recognized as a single entity by USDOE and Florida OSFA
- Due to the highly regulated nature of the work, there is already strong collaboration in place among the three campuses.
- Financial aid is currently awarded campus blind and is portable, facilitating campus movement.
- Consolidation will require an inventory of programs managed on the branch campus offices that are not in OFA in Tampa.
- Financial Education Office services will be extended to Sarasota-Manatee students and expanded on the St. Petersburg campus.
- The current environment is already highly collaborative so consolidation will present limited challenges.

2

Presentations Academic & Student Success Session 2



Career Services

Paul Dosal, Vice President for Student Success, January 16, 2020



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Career Services

- AVP of Community Engagement and Career Readiness provides strategic direction for initiatives designed to prepare students for lifelong career success
- Career services will not be consolidated into a single unit but practices will be standardized across all three campuses.
- Career services personnel on each campus will provide innovative career readying programming that facilitates successful connections among our students, campus, and community partners.

2

Tools and Programs

- **Career Advocacy**
A new model for delivering services at scale, which includes an online course available to all students on all campuses (*Career Navigator*) to serve as the foundation for an always available, online career coach.
- **Handshake**
Make job and internship opportunities available to all students and simplify job and internship posting for employers through a single, consolidated Handshake environment.
- **Career Readiness Badging**
Provides students with an online space to connect their academic and related USF experiences to future work and educational plans; continue the integration of this program into additional academic, co-curricular, and extra-curricular offerings at all three campuses.
- **My Plan + My Pathways**
Provides early access to career assessments to help students identify occupational pathways and best fit majors; expand availability from Tampa and St. Petersburg to include Sarasota-Manatee.

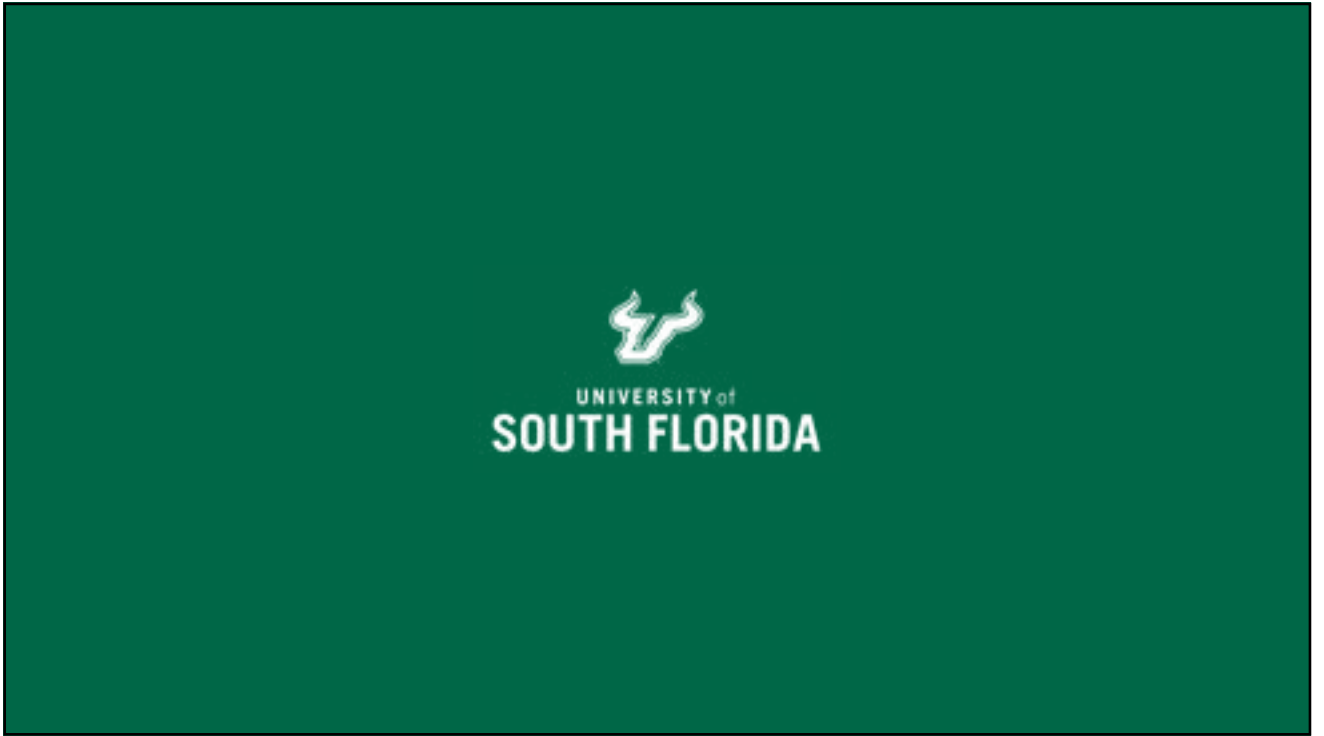
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Career Advocacy

- New model designed to leverage the University's success in the area of Academic Advocacy to provide our students with a foundation for life-long career success
- Coordinates career readying and professional development efforts to run parallel to a student's academic career
- Helps students connect curricular, co-curricular, and extra-curricular activities to career aspirations through the high-tech and high-touch career interventions.

4

Presentations Academic & Student Success Session 2



Class and Classroom Scheduling

Paul Dosal, Vice President for Student Success, January 16, 2020



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Office of the Registrar

- One of three Student Success units that will be “centralized,” with reporting lines of staff on three campuses going to the University Registrar, Catherine Mund.
- Authority and responsibility for most class and classroom scheduling rests with the University Registrar

2

Class Scheduling

- 25Live is used to schedule course sections in general use classrooms across all campuses
- Courses are placed in appropriate classrooms based on size, resources, and pedagogy using 25Live
- The Registrar teams on Tampa and St. Petersburg schedule general use classrooms
- Facilities at Sarasota-Manatee and Shared Student Services in USF Health oversees 25Live on those campuses

3

Current Scheduling

- Time patterns currently differ by campus.
- All courses must have rooms assigned before registration starts; otherwise, they must remain on hold.
- All courses must have fees and attributes assigned before registration starts; otherwise, they must remain on hold.

4

Future course scheduling

- Registrar recommends rebuilding section offerings for 2021, starting with the Spring 2021 section offerings, and repeating with Summer 2021 and Fall 2021 offerings.
- Spring 2021 section building will begin in February 2020, followed by Summer and Fall in September 2020
- Rebuilding will require additional resources and time on task from College schedulers

5

Future Considerations

- In spring 2020 semester, registrar will engage with space managers across all campuses to consider the feasibility of aligning space management under the URO across the campuses
- We may be able to improve the student experience and increase opportunities for cross-campus offerings by implementing same time patterns and final exam schedules

6



Presentations Academic & Student Success Session 2



Student Government Elections

Paul Dosal, Vice President for Student Success, January 16, 2020



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Timeline

Elections: Monday, March 2 through Thursday, March 5, 2020 If a run-off, if needed: March 10 through Wednesday, March 11, 2020

Offices:

- 1 Student Body President/Vice President
- 60 Senators

3 Campus elections

- 1 Governor/Lt. Governor at each campus
- Campus Council representatives at each campus (# of seats still need to be determined in statutes.)

2



Timeline

- **Inauguration:** Thursday, April 16, 2020
- **New Officers** will assume their new roles on Monday, May 11, 2020



Faculty Senate Elections

Jim Garey | January 16, 2020



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Faculty Senate Changes

Currently: Three regional Faculty Senates and the System Faculty Council

- The President of the System Faculty Council serves on the BOT.

Merging the three Senates into a single consolidated Senate

- New bylaws and constitution are completed and approved.
- Retains Academic Affairs apportionment by department, USF Health by college.
- Adds a number of additional at-large members from the USFSM and USFSP campuses.
- Creates two campus councils – chairs sit on the Senate Executive Council.

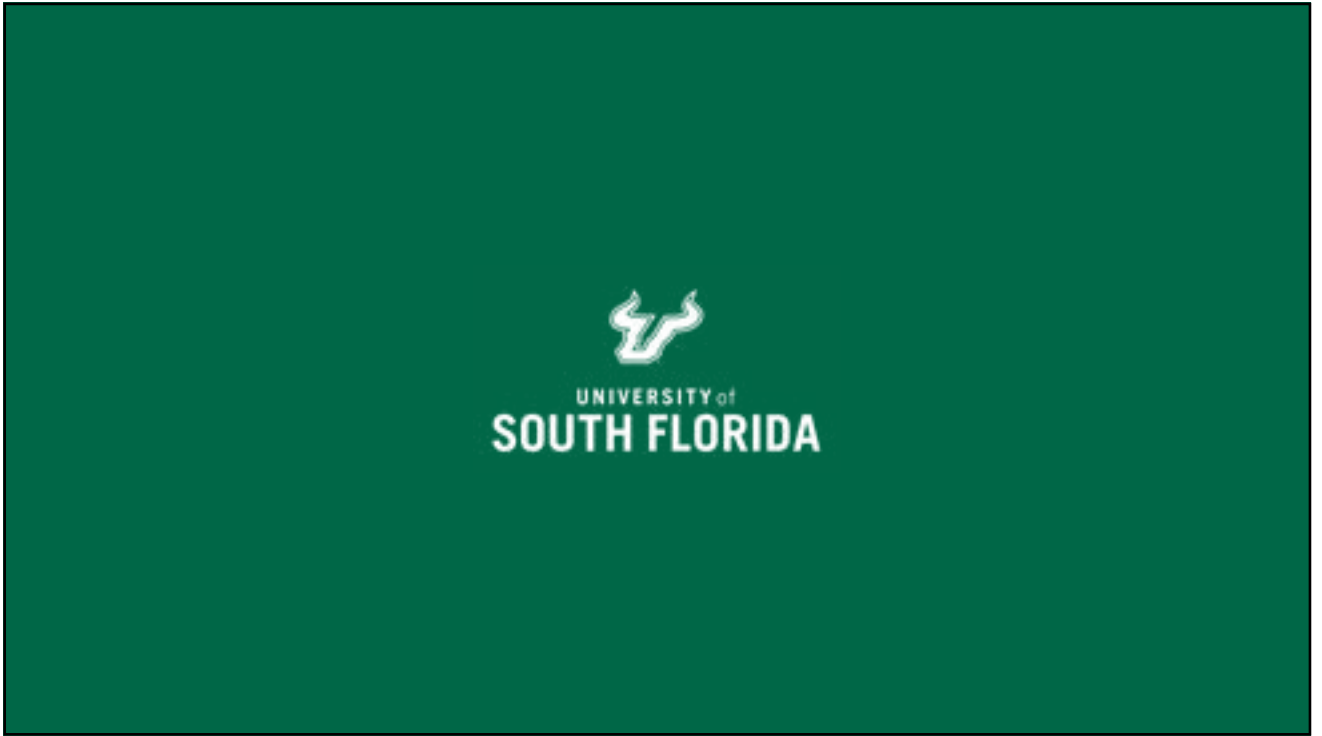
Post Consolidation: Single USF Faculty Senate

- No System Faculty Council.
- USF Faculty Senate President serves on the BOT.

2



Presentations Academic & Student Success Session 2





JANUARY 16, 2020

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