

**USF SARASOTA-MANATEE
ASSESSMENT PLANNING RECORD
2013-2014**

UNIT:	Business and Financial Affairs
MISSION:	<p>The mission of all Business and Finance units is to support the campus' principal functions of instruction, research and community service by providing the quality leadership, essential services by responsibly managing of fiscal resources, human resources and administrative resources. In addition, provide leadership and expertise for the successful planning, design, construction and management of the physical environment.</p> <p>Our primary functions to provide ethical, efficient and effective services in the areas of budget development and support, human resources, purchasing, facilities planning and management, business services and cashiering, copy services, postal and courier services and parking services to both internal and external customers. These include our students, faculty and staff, our vendors and donors.</p>
2012-16 USFSM STRATEGIC PLAN GOALS:	<p>ACCESS: Expand access to a University education that benefits students and the local, national, and global community; and (Aligns with USF System Goals 1,2, 3, 4, 5; SUS Goals 2,3)</p> <p><u>Teaching & Learning</u></p> <p>(1a.) Expand academic programs in distinctive areas related to the Suncoast's needs and strengths and across disciplines, when feasible, including the ability for students to complete the full four-year bachelor's degree.</p> <p><u>Scholarship, Research, and Innovation</u></p> <p>(1b.) Promote innovative scholarship and community-engaged research.</p> <p>(1c.) Seek external funding from public grants, private foundations, and individual donors.</p> <p><u>Public Service & Community Engagement</u></p> <p>(1d.) Partner with a variety of organizations and stakeholders, including the USF System.</p> <p>(1e.) Build a University living and learning community, including residence halls, academic buildings, and student life facilities.</p> <p>SUCCESS: Enhance success of student outcomes, faculty productivity, and community impact (Aligns with USF System Goals 1,2,4,5; SUS Goals 1,2).</p> <p><u>Teaching & Learning</u></p> <p>(2a.) Produce continuous improvement in student outcome measures, including retention and graduation rates and student career results.</p> <p>(2b.) Earn professional accreditation and recognition, including AACSB and NCATE.</p> <p><u>Scholarship, Research, and Innovation</u></p> <p>(2c.) Track and promote faculty-developed measures of scholarship.</p> <p>(2d.) Identify student success predictors.</p> <p><u>Public Service & Community Engagement</u></p> <p>(2e.) Earn recognition as a Carnegie Community-Engaged University.</p>

OUTCOMES	Unit Goal	Means of Assessing Outcomes	Assessment Data	Plan Resulting from Analysis of Assessment	Chancellor's Response (Dr. Arthur Guilford)
(2f.) Track and share the value of the University's and graduates' economic and societal contributions.					
UNIT GOALS:	<ol style="list-style-type: none"> 1. <i>Provide accurate and timely financial and cash collection services for the campus community (Aligns with USFSM)</i> 2. <i>Provide quality Human Resources unit which attracts the best talent, recognizes employee success, and provides opportunities for professional development and personal enrichment. (Aligns with USFSM)</i> 3. <i>Provide administrative leadership to the campus business services which include Parking Services, Purchasing, Cashiering, Copy Services, Postal and Courier Services, Bookstore, and Campus Security (Aligns with USFSM)</i> 4. <i>Provide leadership, support, guidance and oversight in the budget and financial management. (Aligns with USFSM)</i> 5. <i>Provide a safe environment for students, faculty, staff, and visitors (Aligns with USFSM)</i> 6. <i>Develop and implement the USF Sarasota-Manatee Campus Facilities 10-Year Master Plan (Aligns with USFSM)</i> 7. <i>Develop and implement improvements for enhanced cost and work effort efficiencies in facilities operations. (Aligns with USFSM)</i> 8. <i>Develop and implement initiatives for energy usage and cost reductions, and promote sustainability. (Aligns with USFSM)</i> 9. <i>Maintain accurate and timely facilities space and asset management and reporting. (Aligns with USFSM)</i> 				
Achieve no audit findings in University internal audits	1	(a) Review of UAC internal audits and University audited financial statements	<ol style="list-style-type: none"> a. There was no specific FY13 financial audit of USFSM, but the USF System audit found no deficiencies in internal control over financial reporting. Financial highlights point to increase in net assets, and an increase in operating revenues. b. The Office of University Audit and Compliance performed an audit of the USFSM Cashier's Office 14-018 with an overall conclusion that there was an adequate system of internal control in place to meet audit objectives, and no high risk issues were identified. In response to the audit, the USFSM Cashier's Manual was updated January 2014 to 	a. Continue to monitor UAC audit and findings. Follow current financial oversight of finances	Continue to monitor all functions and make changes where the audit process indicated that the process needs to be monitored.

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			<p>reflect current operating procedures and contact information. All appropriate office forms and robbery prevention and response procedures are included in the manual.</p> <p>c. The Office of University Audit and Compliance performed an audit of the USFSM TickeTrak Operations (parking services) 14-029 with an overall conclusion that there was an adequate system of internal control in place to meet audit objectives, and no high risk issues were addressed in the report. Recommendations were made to restrict the use of Banner to only daily permit sales or eliminate the use of Banner for all permit sales.</p>	<p>Parking Services is in the process of adding a second TickeTrak cash drawer to provide a way for the Banner Cashier to assist and/or cover for the Parking Specialist for parking permit sales. Project is expected to be completed by 7/30/14 in time for the Fall permit sales.</p>	<p>I am pleased that the changes have been made in parking and that all changes will be in place prior to fall.</p>
		(b) Review of cash collection records	<p><u>b. Physical Security Measures</u></p> <ul style="list-style-type: none"> Electronic Key Card Access Security Cameras ADT Alarm System Password-protected keypad controlled entry to safe room Panic buttons Dual-Entry Safe – Combination & Key Access to stored funds is limited to two individuals – one primary; one secondary Safe Combination – Changed periodically and when an employee with knowledge of the combination terminates or is reassigned Safe Key – Safe is rekeyed when an employee with access to the key terminates or is reassigned <p><u>Procedural Guidelines for Cashier's Office Operations</u></p> <ul style="list-style-type: none"> University Controller's Office – Cashier's Office Operations Manual Payment Card Industry (PCI) Security Standards 	<p>b. Continue procedures in place to ensure cash collection process safeguards against loss</p>	<p>It seems to me that the process is about as safe as it can be at the present time. Please continue to monitor to safeguard against any losses.</p>

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			<ul style="list-style-type: none"> • Federal Educational Rights and Privacy Act (FERPA) – Regulations governing student privacy issues • State of Florida Record Retention Requirements • University Audit & Compliance mandates <p><u>Cashier's Office Staff</u> Training/Certification Annual cash collections training and certification exam Annual PCI training and certification exam Minimum of two staff members are required to be in the Cashier's Office at all times</p> <p><u>Internal Controls</u> The Cashier's Office is the only authorized cash collections site on the Sarasota-Manatee Campus (excluding Foundation accounts)</p> <p><u>Segregation of Duties</u> Record Keeping Authorization Custody Reconciliation</p> <p><u>Surprise Cash Counts</u></p> <p><u>Passwords and Keys</u> Password-protected POS and TouchNet systems, with each cashier having their own, unshared password All system accesses are inactivated and access cards and keys collected when an employee terminates or is reassigned</p>		<p>This seems like an excellent process to assure that the Cashier's office is the only office to receive funds with the exception of the Foundation (Advancement) office.</p>

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			<p><u>Compensating Controls</u> Supervisory review and verification of: Cashier balancing reports and deposit data Cashier overages and shortages All adjustments to cashiering entries and credit card voids are subject to supervisory documentation and approval</p> <p><u>Storage of Funds</u> During business hours, funds are stored in individually-assigned cash drawers networked to, and opened by, the register receipt validator After hours, cash drawers are locked in individually-assigned cash boxes in the safe</p> <p><u>Receipt of Funds</u> Initial receipt of funds documented by: System-generated validator receipts Credit card terminal receipts Inter-departmental mail logs documenting transfer of funds TouchNet credit batch reports & FAST deposit entry reports Checks are restrictively endorsed immediately upon receipt On Account/Unidentified checks are deposited into the University Sarasota Unidentified payment account.</p> <p><u>Balancing and Depositing of Funds</u> Cashiers are accountable for balancing their cash drawer and credit card transaction receipts daily (sales to actual collections) Funds are deposited in accordance with USF cash collections guidelines Deposits are reconciled against merchant statements and the general ledger monthly.</p>		<p>This seems like a good plan to have the cashier's balance their cash drawers and credit card transactions daily.</p>

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			<p><u>Documentation of Transfer of Funds</u> Customer to Cashier – Customer provided with a receipt Cashier to Supervisor – Cashier & supervisor sign and date balancing reports and deposit slips Campus Department to Cashier – Transmittal form signed by department representative delivering check and cashier receiving funds Cashier's Office to Courier – Cashier & supervisor initial bank deposit bag; courier signs a Deposit Transfer Form (3-part/pre-numbered) acknowledging date and time of funds transfer, deposit bag number, and dollar amount of deposit</p> <p><u>Records Retention</u> The Cashier's Office adheres to retention requirements as mandated by Florida Statutes (General Records Schedule GS1-SL For State and Local Government Agencies) Cash Collection Receipts Reports Bank Statements and Related Deposit Reconciliation Documentation Record copies are retained for a minimum of 5 Fiscal Years provided applicable audits have been released Payment Card Sensitive Security Authentication Data (as defined by the PCI Security Standards Council): Full magnetic strip data, verification code, PIN __ This information is utilized solely for the purpose of completing a payment card transaction -- no permanent record of this data is retained by the Cashier's Office.</p>		
Deliver quality Human Resources programming	2	(a) Increase the overall satisfaction with the services offered by Human Resources	a. Regular monthly HR workgroup meetings are held to review and discuss issues impacting Human Resource activities. All members are provided with an opportunity to submit agenda items and	a. Continue to evaluate services provided by HR unit.	The HR unit appears to be highly effective. Carolyn is doing an excellent

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			<p>are provided with an open forum to discuss HR issues, concerns, service.</p> <p>Processing of appointments was consistently completed on time to meet payroll deadlines. In fact, every effort was made to assist departments with processing changes after the guarantee dates to meet payroll deadlines.</p>		<p>job and works well with staff and faculty.</p>
		(b) Provide assistance and guidance to hiring managers/search committees in the search process on in a timely and accurate manner	b. Provided search guidance/support for. 48 searches for FY 13/14. This section has been revised to meet our current hiring needs.	b. Ensure that all USFSM search processes are consistent and hiring managers/search committees have necessary tools to hire the best candidates	Conducting 48 searches is really quite remarkable.
		(c) Ensure the provision of quality comprehensive and professional employee orientation program	c. USFSM Human Resources provides one on one orientation programs for new hires due to the limited number of hires. The orientation is designed to meet the individual needs of our new employees in a timely manner. This ensures all new hires have paperwork completed and a personalized benefit overviews to best meet individual needs.	c. Utilize new processes established at the system level to ensure employees are properly equipped to begin their assigned duties immediately.	This seems like a very workable plan. I am pleased that the staff is being so well trained.
		(d) Increase number of professional development and personal enrichment opportunities and employee participation in these events	d. From 7/1/13 to present, our campus has held over 20 professional development/enrichment workshops. Professional development areas included: social security, harassment, diversity, disability etiquette, Attendance and Leave, Retirement and Estate planning, etc. Several workshops focused on retirement benefits due to the legislative focus on retirement changes.	d. Continue to monitor needs related to development and enrichment opportunities and provide those programs.	Excellent career opportunities to provide the staff training opportunities.
		(e) Increase in participation for faculty and staff recognition and events	e. Faculty and Staff recognition events included; The academic year kick off, holiday party, faculty and staff recognition and take your child to work day. Events this year yielded excellent attendance, including a record number for our Faculty and Staff Recognition.	e. Continue to involve faculty and staff in developing and implementing events. Continue to support budget for increasing	I am very pleased that the staff and faculty are participating in more recognition events.

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			Kick-Off: - 139 Holiday: - 126 Faculty & Staff Recognition: - 102	participation.	
		(f) Increase in participation in the Employment Benefits Fair	f. The state benefits fair held in coordination with New College and FSU-Ringling had 30 vendors in attendance. Attendance by USF employees was approximately 85 with an overall attendance of 248.	f. Continue to promote with other institutions the Employee Benefits Fair.	
Deliver a quality procurement operation	3	(a) Increase in the number of PCard users on the campus and monitor limits to be consistent with system wide procedures	a. PCard users have maintained at a consistent level as a result of very little change in personnel who make purchases for campus units. PCard limits are monitored and adjusted as the situation arises for individual PCard holders. Increased PCard usage in some instances reduced the number of after the fact purchase orders.	a. Monitor PCard use and ensure that cards issued are being used properly in accordance with proscribed system rules.	Please continue to monitor as you are currently doing.
		(b) Provide PCard training to new users	b. PCard Training – Individual sessions were provided throughout the year and individually to new employees and those employees who previously had not been issued a PCard. The level of training requirements initiated by the USF System has required that additional training sessions be held to meet requirements.	b. Continue to provide training as needed in PCard use. Continue to maintain the Purchasing Overview manual to help new employees understand USF's purchasing process; Continue periodic e-mails and information sessions as needed; Continue to work with USF's and State's auditors on purchasing issues, and share results and remedies with office managers and other purchasers.	P Card training and purchasing seemed to be effective. This may be an activity that needs to be repeated from time to time when we have new staff.
		(c) Have an 85% customer satisfaction rating on the Employee Satisfaction Survey	c. Purchasing Customer Satisfaction - The latest Campus Workplace Survey did not indicate any dissatisfaction with the local campus procurement processes.	c. Monitor dollar volume and activity of use of PCard to determine satisfaction.	

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Deliver a quality Bookstore Program for Faculty and Students	3	(a) Have an 85% customer satisfaction rating on the Student Satisfaction Survey	a. The Student Satisfaction Surveys have shown fairly consistent ratings over a 3 year period from 67% to 72%. The most consistent comment regards book pricing. With so many other venues to purchase textbooks students are shopping price. In addition, the Surplus Book Program makes additional text books available to students at no cost by encouraging professors to donate books to the Library or put them on reserve.	a. Continue to monitor Bookstore services to meet needs of student and faculty audience. Will continue reviewing survey results and looking for areas to improve.	I am pleased that the satisfaction rating from students is a high as it is.
		(b) Implement book rental program for students	<p>b. Bookstore sales peaked in 2007-08 at \$1,131,000 (generating commissions of approximately \$100,000). Gross sales have declined steadily since then and for the 2013-14 fiscal year are expected to reach only \$688,000 (generating \$61,920 in commissions). The Campus Bookstore is shared with New College of Florida. Sales are down for numerous reasons, but the main reasons are: The national economic climate, increased use of textbook rentals, increased purchase of digital textbooks and a reduction of the financial aid book advance program plan (BAPP) amount which was decreased from \$700 to \$500.</p> <p>Summary:</p> <p>Rentals – This is an exciting area. Textbook rentals are up 166% over past 2 years and up 81% over past year. (A new rental book cost is 50% of the new book price. A used rental book cost is 50% of the used book price.)</p> <p>In April 2012 rental availability was 36.4%, with 25.2% penetration (meaning that when faced with a choice to buy or rent, only 25% chose to rent). In April 2014 87.2% of all titles adopted by our faculty were available for rent, with 51.2% penetration.</p>	b. Continue to promote the Book Rental Program.	The book rental program seems like a real winner for students. I would like to see it and the use of electronic books expanded.

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			<p>In April 2012 students saved \$150,271 by renting books over the purchase of a new one. Two years later, in April 2014 students saved \$247,221 by renting over purchasing new.</p> <p>This has produced great savings for the students, and represents one of the biggest reasons the bookstore's annual gross sales are decreasing.</p> <p>E-books - Digital textbooks are up 69% over past 2 years and up 34% over past year. (A digital book sells for 40-60% of the new book price.) Digital textbook availability is 45% of all books adopted and penetration is 5%.</p> <p>New Textbooks - New textbook sales are down 36% over past 2 years and down 26% over past year.</p> <p>Used Textbooks - Used textbook sales are down 51% over past 2 years, and down 42% over past year. (A used textbook sells for approximately 75% of the new book price.)</p> <p>Students still prefer the bookstore - According to Business Officer magazine May 2014 "Despite the many changes in demand, delivery, business model, and physical versus virtual format, most bookstores are holding their own. Although students have more options than ever when it comes to acquiring course materials, the NACS' Student Watch survey found that on-campus bookstores remain the No. 1 place for students to obtain their materials."</p>		<p>Great to continue the use of e-books to the extent possible as these are usually less expensive for students to purchase.</p>
		(c) Improvement in bookstore facilities	c. The fund provided by the bookstore for repair and replacement is in place for projects to make the bookstore a more workable environment and to improve internal and street appeal. With discussions to sell the Viking Property to the SRQ	c. Monitor facilities to determine where improvements are needed. The USF Business Manager, the NCF Administrator (VP	It would appear that in the next year we are going forward with the sale of the south parcels to the

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			<p>Airport, alternative locations are being discussed to relocate the bookstore to provide more space for marketing university and college merchandise.</p>	<p>Finance) and the Bookstore Manager review the reports to make sure improvements continue to be made with compliance. Continue to evaluate and consider new ideas to serve students, such as adding a laptop computer financial aid purchase program;</p>	<p>airport. Therefore, we should be making plans about the relocation of the bookstore and what the needs of the bookstore are.</p>
		<p>(e)Ensuring that USF S-M is in compliance with 1004F.S. Textbook Affordability Act</p>	<p>e. USFSM is in compliance with the Textbook Affordability Act F.S. 1004.085. Professors are adopting their textbooks on time so that the ISBN numbers may be posted and students may have the opportunity to shop from multiple sources. Reports from the local bookstore manager indicate that 85.9% to 94.2% of textbooks are being adopted by the deadlines. Late adoptions occur when new faculty are hired late in the process. (Spring 2013 was 94.2%, Summer 2013 was 86.4%, Fall 2013 was 85.9% and Spring 2014 was 92.2%).</p> <p>Barnes & Noble College Bookstores, who operate our bookstore, has a software application on-line called Faculty Enlight. This application is designed for faculty to use when adopting books. It shows the faculty a lot of helpful, relevant information, such as: What their peers are using for the same or similar courses at other universities; What they ordered the last time they taught the course and whether or not there are newer editions available; And how to get a desk or exam copy from the publisher. The local bookstore manager reported that in FY 13 33% of the faculty adopted their books through Faculty Enlight and for FY 14 is was 87%.</p> <p>The Bookstore tracks the progress of book adoptions</p>	<p>Monitor compliance with FS1004. In May 2014 a written tutorial was provided to assist professors in adopting textbooks using Faculty Enlight. Provided tutorial to Office Managers and Administrative Assistants so they can assist new faculty get books adopted as soon as the hiring process has been completed.</p>	<p>Continue to monitor for our compliance.</p>

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			and posts the book list before the deadline date; Posting of information allows students to shop for textbooks; USF SM has been awarding the 10 Barnes & Noble book scholarships to the neediest students in an effort to help them purchase textbooks. The book rental program is an ever growing percentage of bookstore revenue.		
		(f) Commissions received will be verified for accuracy	f. The Business Manager compares Barnes & Noble's corporate report with the local store's cash register reports; When discrepancies are noted, more research is done.	f. Continue to monitor commissions' reports.	
Deliver Excellent Business and Support Services	3	(a) Have an 85% customer satisfaction rating on the Student Satisfaction Survey related to Parking Services and Student Cashiering	a. Cashiers Office – The Spring 2014 Student Satisfaction Survey results gave the Cashier Services a mean rating of 79% satisfied/very satisfied. Parking received a 76% rating in the same survey. There was not increase in parking rates in FY 2013-14. As a result of improved campus security, a more rigorous parking enforcement effort has been in place.	a. Continue to monitor Parking and Cashiers Office activity to ensure they meet needs of students, staff and faculty.	Business and support services appear to be excellent. The students' satisfaction survey is very strong and I am pleased with the results. The food services appear to have improved and I am pleased to see that. Also, I am pleased that the Perlman's are so pleased with
		(b) Increase in volume of in-house printing at the copy center	b. Copy Center – The self-supporting auxiliary provides 3 services: Copy jobs to departments and faculty, over-the-counter sales to students, and maintenance of a fleet of 16 multi-function digital copiers. Revenue from copy jobs had increased over the years. Coordination of the installation of new copier/printers presented many challenges, but with the installation of Equitrac software, billing became a manageable process. New staff has been hired to with increased skills to improve services and billing.	b. Monitor copy center activity	
		(c) Enhance food services and expand catering (Perlman) opportunities	c. Successfully coordinated efforts between Jonathan's Café to provide catering services for the winter Perlman event. Results were successful. Promoted internal and external events catering.	c. Continue to work with the Perlman Institute staff to plan the food services for the event and monitor satisfaction. Continue to promote this service to events that need catering.	

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		(d) Have 85% customer satisfaction rating on Student Satisfaction Survey in Food Services	d. Jonathan's Café was opened in August 2009 and continues to strive to meet student food service needs. The menu is much more flexible than the previous food vendor. The Spring 2014 Student Satisfaction Survey showed 67% Satisfied/Very Satisfied. Continued investment in equipment and new menu items are made to increase customer satisfaction. Various tastings have occurred over the past year to get customer input for menu offerings.	d. Continue to monitor food service survey results and adjust operations to ensure they meet needs of students, staff and faculty.	the quality of the food service when they are here.
Facilitated Budget Development and Management	4	(a) Budgets for all sources are balanced.	a. Working in conjunction with the University Budget Office, we are provided with funding source Control Totals broken down by non-salary and salary/fringe categories. Detailed spreadsheets for the campus are prepared at both an employee (salary/fringe) and unit/department level (non-salary and salary/fringe) that support reconciliation to the University Control totals. For those funding sources such as our auxiliary operations that are managed and maintained only by the regional institution, all of the annual budget submissions are reviewed in detail by the campus Budget Office against the historical general ledger data to assure the budgets reasonable and balanced.	a. Constantly monitor all sources of revenues and planned expenditures to ensure balanced budgets.	Budgets continue to be well monitored and in excellent shape. We do need to maintain our reserves, but we also need to move forward in land acquisition projects as well.
		(b) Maintaining a minimum 5% Reserve	b. A 5% reserve is reflected in our annual budget. No new expenditures occurred from reserve balances but for the normal purchase order roll over process that occurs at the end of each fiscal year. This ensures that campus reserves can build.	b. Continue to provide 5% reserve in carry forward chart field.	
		(c) Coordinating training for departmental staff responsible for monthly reconciliations to ensure that all departments are following reconciliation procedures.	c. Various new and refresher training sessions throughout the fiscal year occurred in the areas of concentration in FAST, Finance Mart, general ledger, cash collections, account reconciliation, payroll, in an effort to provide staff with the tools and resources necessary to understand the components reflected in the departmental ledgers to enhance the reconciliation process. The Campus Budget	c. As new processes and systems improvements are in place continue to provide training to ensure units are reconciling departmental budgets.	

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			office will also provide one-on-one training and schedule periodic meetings with each unit to review reconciliation procedures to assure consistency amongst departments as well as making sure that appropriate internal controls and sound business practices are in place for the effective management and protection of campus and University resources. A number of new employees and staff turnover required a heavier level of training to ensure that departments are functional in each area to ensure reconciliation occurs.		I am pleased that you are participating in academic affairs meetings. This will be highly effective in planning for future academic program development.
		(d) Monthly meetings with Academic Administration to review budgets and plan for future expenditures.	d. Each month the Fiscal & Business Analyst representing the Finance and Administration unit of the campus attends a meeting consisting of the administration of our Academic Affairs unit. These joint sessions create a cohesive approach to evaluating appraisals made in the areas of instruction, programming, and advising in terms of budgetary resources required and available. With the largest combined budget on the campus, Academic Affairs will be hiring their own Fiscal and Business Analyst to provide financial analysis and projections, budget management, and fiscal resource management for all of Academic Affairs. This position will serve as the liaison to all units of Academic Affairs as well as Finance & Administration. This professional position will add that necessary layer of financial reporting, forecasting, trends in spending, and assurance that the financial activities are in compliance with all applicable federal, state and USF policies and procedures.	d. Continue to participate in Academic Affairs meetings to provide fiscal input in budget planning.	
Provide Excellent Public Safety and Security Services	5	(a) Have an 85% customer satisfaction rating on the Student Satisfaction Survey related to Police and	a. In the Student Satisfaction Survey, Campus safety was rated 4.43% as satisfied/very satisfied. There was an increase in the percentage of dissatisfied as a result of increased parking enforcement to ensure	a. Monitor services provided by the NCF police and security officers.	Safety has become increasingly an important area. I trust that we will

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		Campus Security	campus safety. In addition to the contract for police services with NCF, USF Security Officers patrol the campus during all hours the facility is open and escorts students/faculty/staff to vehicles at their request. Rebranding of USFSM Public Safety was initiated and completed in 2014.		move forward with our internal alerting system as quickly as possible and that we will also involve Environmental Health from Tampa.
		(b) Address campus safety issues through the development and installation of emergency notification systems	b. External security cameras are installed in all parking lots and the blue light emergency notification phones are in proper working order. An external emergency notification system is installed and is tested on a regular basis. Internal security cameras, digital recorders and surveillance software have been replaced to upgrade the resolution quality. Emergency silent alarm buttons are installed in key locations. Classrooms are provided with an emergency lockdown system.	b. Continue to invest in additional emergency notification systems	
		(c) Update Emergency Operations Plan, Essential Personnel and Emergency Personnel Lists	c. The USFSM Emergency Operations Plan (EOP) is updated with current contact information at the beginning of each semester and provided to USF System Office of Public Safety. The USFSM Continuity of Operations Plan (COOP) is reviewed on an annual basis, updated as needed and provided to the USF System Office of Public Safety. The updated EOP and COOP are also provided to the USF System Office of Environmental Health & Safety. As a result of hiring opportunities in USFSM Office of Facilities Planning & Management (FPM), hiring is in progress for a FPM Associate Director to assume responsibility for coordinating EOP and COOP.	c. Maintain and update EOP and COOP documents. Continue to communicate updates to USF System departments as needed. Complete hiring of FPM Associate Director to assume responsibility for coordinating EOP and COOP.	
		(d) Participate in system wide Emergency Preparedness Committee	d. Maintain close communications with the USF System Emergency Management Offices. Serve as a member of the USF System Emergency Management Committee (EMC) and attend meetings as scheduled. Develop relationships with other universities and colleges in the region for improved	d. Continue to participate (or have designee) in the USF System EMC committee meetings. Continue to develop relationships with other	

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			communication and support. Participate and coordinate with local jurisdictions for emergency preparedness exercises.	universities and colleges in the region for improved communication and support. Continue to participate and coordinate with local jurisdictions for emergency preparedness exercises.	
Develop and implement the USF Sarasota-Manatee Campus Facilities 10-Year Master Plan	6	Continue development of the 2010-2020 Campus Master Plan Update. Initiate negotiations for the Campus Development Agreement with the local host community.	USFSM 2010-2020 Campus Master Plan Update was approved in concept by the USFBOT. Campus Development Agreement negotiations with Manatee County Government (local host community) are in progress. Although the UBOT did not approve the master plan as developed, new strategies are being developed to ensure that in 2014-15 the plan will go back to the UBOT for approval.	USF plans to initiate a System-wide 2015-2025 Campus Master Plan Update during 2014-2015. USFSM will update its 2015-2025 Master Plan to include relevant portions of the 2010-2020 Master Plan as well as new information. USFSM will continue Campus Development Agreement negotiations with Manatee County Government during the coming year.	We will need to continue to review the master plan. It is an excellent one, but one that will need to be modified due to the fact that the hotel has been recently sold. We also need to push Tamp to b as aggressive as possible about helping us acquire new land parcels.
		Continue the planning, design and construction of campus facilities and infrastructure improvements identified by USFSM 2010-2020 Campus Master Plan.	Completed multiple campus facilities and infrastructure improvements identified by USFSM 2010-2020 Campus Master Plan. Completed projects addressed USFSM needs related to security, lighting, surveillance cameras, wireless connectivity, utilities and energy efficiency improvements, roadways, landscaping and sidewalks. Completed multiple minor interior renovation construction projects and physical improvements authorized by the campus administration.	Continue the planning, design and construction of campus facilities and infrastructure improvements identified by USFSM 2010-2020 Campus Master Plan Update. Continue the planning, design and construction of campus physical improvements authorized by the campus administration.	

OUTCOMES	Unit Goal	Means of Assessing Outcomes	Assessment Data	Plan Resulting from Analysis of Assessment	Chancellor's Response (Dr. Arthur Guilford)
		Continue efforts to implement the recommendations of an on-campus student housing feasibility and market analysis study.	On-campus student housing feasibility and market analysis study was completed in March 2013. Recommendations of the housing study do not support on-campus student housing until at least Fall 2016. Evaluate enrollment and fiscal targets to plan for future housing needs. Evaluate property acquisition and land development opportunities to support on-campus student housing.	Continue to evaluate enrollment and fiscal targets on an annual basis and implement plans for on-campus student housing when feasible. Continue to evaluate property acquisition and land development opportunities to support on-campus student housing.	
		Complete construction and occupancy of USFSM-Mote Marine Laboratory facilities. Implement facilities operations and support services agreements with Mote Marine to support the continuing operation of the facilities.	Construction and occupancy of the USFSM-Mote Marine Laboratory facilities were completed in August 2013. Classes are being held in these facilities. Facilities operations and support services agreements with Mote Marine are complete.	Monitor USFSM-Mote Laboratory facilities start-up and address issues that may occur during the one-year warranty period. Monitor and report utilities and support services costs.	
		Complete interior improvements and evaluation of existing building systems as required for occupancy of USFSM Lakewood Ranch Culinary Innovation Lab. Implement facilities operations and support services agreements to support the continuing operation of the facilities.	Lease Agreement for the USFSM Lakewood Ranch Culinary Innovation Lab was completed in December 2013 and the facility was occupied in January 2014. Classes are being held in these facilities. Facilities operations and support service agreements are complete.	Monitor USFSM Lakewood Ranch Culinary Innovation Lab facilities start-up and address issues that may occur. Monitor and report utilities and support services costs.	This is a beautiful facility but definitely needs a business plan. You may need to assign Chris Starosta to assist the CIL in developing an effective business plan.
		Continue to evaluate land acquisition opportunities for properties identified by	USFSM remains actively engaged in efforts to acquire properties identified by the 2010-2020 Campus Master Plan Update. USFSM also remains in	Continue to evaluate property disposition, acquisition and land	

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		the 2010-2020 Campus Master Plan Update.	negotiations with the Sarasota-Manatee Airport Authority (SMAA) for the potential sale of property lying in the federally-mandated Runway Protection Zone (RPZ). Property dispositions or acquisitions will be presented for USFBOT approval.	development opportunities to support the 2010-2020 Campus Master Plan Update.	
Improve facilities operations performance and cost effectiveness	7	Continue annual assessment of overall on-time completion of maintenance and custodial work orders to ensure an average on-time performance score of 90% for the 2013-2014 assessment period.	Annual assessment was completed with overall annual on-time completion of 90% for the 2013-2014 assessment period.	Continue annual assessment of overall on-time completion of maintenance and custodial work orders to ensure an average on-time performance score of 90% for the 2014-2015 assessment period.	Much progress has been made in this capacity/. Please continue to monitor for improvements.
		Continue annual assessment of USFSM Customer Satisfaction Surveys to ensure an average satisfactory performance score of 4.0 (on a 0-5 scale) for the 2013-2014 assessment period.	Annual assessment of USFSM customer satisfaction survey was completed in May 2014 with an average satisfactory performance score of 4.26 for the 2013-2014 assessment period.	Continue annual assessment of USFSM Customer Satisfaction Surveys to ensure an average satisfactory performance score of 4.0 (on a 0-5 scale) for the 2014-2015 assessment period.	
Decrease utilities consumption and energy costs for campus facilities	8	Continue monthly monitoring and reporting of electricity costs with a goal of 2% reduction in overall electrical costs from 2012-2013 levels.	Continued monthly monitoring and reporting of electricity costs. Costs from the 2012-2013 assessment period did not meet the 2% reduction goal. Central Energy Plant equipment failures on two occasions required energy usage during FP&L peak periods and resulted in a financial penalty assessment.	Continue monthly monitoring and efforts to maintain or reduce overall electrical costs. Implement maintenance procedures to minimize equipment failures and resulting impact to electricity costs.	We have made great progress in this area. I hope that we can continue to improve our efficiency.
Promote initiatives related to sustainability for		Initiate LEED Existing Building Operations & Maintenance (EBOM) certification for campus	Completed consultant contract to implement LEED EBOM certification application process. Consultant has completed an evaluation of existing building metrics and developed policy drafts for adoption by	Complete LEED Existing Building Operations & Maintenance (EBOM) certification application	If we can achieve LEED that would be great. Perhaps our new hire will be

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campus facilities		facilities.	USFSM. Following policy adoption, USFSM will initiate a performance evaluation period.	process for USFSM facilities in 2014-2015.	instrumental in assisting in this regard.
		Continue to implement and promote best practices to improve campus sustainability efforts.	Continued the implementation of best practices related to custodial, maintenance and solid waste/recycling efforts.	Continue to implement and promote best practices to improve campus sustainability efforts.	
		Participate in USF System Sustainability Committee in support of the AC&U Presidents Climate Commitment.	Participated in USF System Sustainability Committee and other sustainability-related organizations. Participated in multi-department USFSM Sustainability Committee.	Continue to participate in USF System Sustainability Committee and other sustainability-related organizations. Continue to participate in multi-department USFSM Sustainability Committee.	
Maintain space management and asset management analysis and reporting	9	Continue to collect, analyze and report classroom space utilization data on a semester basis using the approved USF System format.	Classroom space utilization data was collected, analyzed and reported on a semester basis using the approved USF System format.	Continue to collect, analyze and report classroom space utilization data on a semester basis using the approved USF System format.	Space issues seem to be improving. New and improved methods and management software may also enhance scheduling.
		Participate in USF System efforts to implement Live25 scheduling software on all campuses.	Participated in software demonstration in association with Academic Affairs. Anticipated timeline for implementation is Summer 2015.	Continue to participate in USF System efforts to implement Live25 scheduling software on all campuses.	
		Continue data collection, analysis and reporting of space utilization and costs for externally-sponsored events on a semi-annual basis.	Responsibility for data collection, analysis and reporting of space utilization and costs for externally-sponsored events were assigned to USFSM Campus Advancement in October 2013. FP&M continues to receive and report collected revenue only.	Discontinue reporting of this outcome on future reports.	
		Continue data collection and analysis of Integrated Facilities Information Systems (IFIS) space	Integrated Facilities Information Systems (IFIS) space utilization data by space type for colleges and departments (by department code) was collected, analyzed and reported on an annual basis using the	Continue data collection and analysis of Integrated Facilities Information Systems (IFIS) space	

OUTCOMES	Unit Goal	Means of Assessing Outcomes	Assessment Data	Plan Resulting from Analysis of Assessment	Chancellor's Response (Dr. Arthur Guilford)
		utilization by space type for colleges and departments (by department code), and report findings on an annual basis using the approved USF System format.	approved USF System format.	utilization by space type for colleges and departments (by department code), and report findings on an annual basis using the approved USF System format.	
		Continue data collection, analysis and reporting of facilities assets (furnishings and equipment) utilizing asset management software, and report findings on an annual basis	Facilities assets (furnishings and equipment) data was collected, analyzed, and reported utilizing asset management software data on an annual basis.	Continue data collection, analysis and reporting of facilities assets (furnishings and equipment) utilizing asset management software, and report findings on an annual basis.	
		Continue implementation of ARCHIBUS space management and work order software platform.	ARCHIBUS Space management and work order database platform migration was completed in February 2013. Software enhancements to address items of concern raised by system users were completed in November 2013.	Continue to modify and update software platform to increase efficiencies. Provide improved training to USFSM staff. Develop tutorial to assist system users.	This is an excellent idea to continue to search for new and innovative ways to manage data.