Objective 1: Leverage our Catholic heritage and Franciscan identity (of a values-oriented institutional culture) to create an intentionally diverse and welcoming community - so that our students lead, succeed, and graduate in order to positively contribute to their communities.

Goals	Strategies	Milestones/Measures
1. Ensure the student body embraces and reflects the diversity of a global world	1. Focus recruiting on more diverse population – including geographic (non-IL, international) and socio-economic. 2. Design and celebrate cultural/spiritual offerings that reflect the diversity of our students. 3. Strengthen how USF <u>embraces</u> diversity with curricular and co-curricular programs that build an inclusive culture in understanding the multicultural richness of our society.	• # appl/enrl minority students: • # appls/enrl (>50-mile) students: • # program offerings: • Suitable % at DEI events: • 2 FrankChats/year: • Campus Culture Survey every 3 years:

USF Fall Undergraduate Students

USF Fall Undergraduate Students	Joliet '20	F22	F23	F24	F25	F26	F27	F28
Caucasian	47.5%	47.9%	47.3%					
Hispanic	30.5%	30.0%	31.9%	30.0%	30.0%	31.0%	31.0%	32.0%
Afr.-American	16.4%	9.5%	9.6%	9.5%	10.5%	11.5%	12.5%	13.5%
Asian	2.0%	3.5%	3.7%					
Other/dual	3.6%	9.2%	7.6%					

Goals	Strategies	Milestones/Measures
2. Increase understanding and commitment to the tenets of a Catholic Franciscan higher education grounded in the expression found in the Catholic Social Teachings so that we exceed national averages for student and alumni satisfaction and learning outcomes.	1. Incorporate a formatiinal plan through sacramental life, spiritual programming, vocation plans, and annual immersion experiences/retreats – to enable all students to integrate their faith within their college journey. 2. Offer service events each semester for employees and students – including understanding of personal role in contributing to the common good. 3. Continue to incorporate CST, Franciscan intellectual tradition, and knowledge of the sponsoring congregation – as well as anti-racism and implicit bias training.	• # participating in formative moments: • Mission moments at each Board, EC, and UC meeting: • Percentage in Anti-racism training – CARE teams, RAs, PMs: • 100% Implicit Bias training for Search committees:

1. Ability to discuss/explain Catholic Intellectual Tradition. (1 = unaware, 3 = somewhat, 5 = at length)
2. Ability to discuss/explain Catholic Social Teaching.
3. Ability to discuss/explain Catholic Moral Teaching.
4. Ability to discuss/explain Institutional Mission.

CIMA	ACCU 23	2023	2024	2025	2026	2027	2028	2029
#1	2.62	2.28	2.32	2.45	2.58	2.60	2.62	2.64
#2	3.14	3.00	3.04	3.08	3.10	3.12	3.14	3.16
#3	3.08	2.90	2.95	2.98	3.00	3.05	3.08	3.10
#4	3.72	3.72	3.72	3.73	3.73	3.74	3.74	3.75

Goals	Strategies	Milestones/Measures
3. Strengthen communities of learning to provide all members a sense of belonging.	1. Track and assess targeted opportunities for student engagement outside the classroom through Student Life and Clubs & Organizations (SLO). 2. Support efforts for better student engagement – especially commuters and culture-based clubs/organizations. 3. Utilize SAMHSA grant to increase awareness and enhance positive mental health. 4. Focus on New Student Programming to create a First Year Experience and engagement with at-risk populations.	• # involved with SLO: • # SGA (non-classroom) events in Suitable: • # Commuter Events: • # Culture-based clubs: • "Flourishing Scale": • FYE Attendance: • % at-risk connect to care person:

Noel Levitz Student Satisfaction Survey Scores	Nat'l AY20	AY20	AY23	AY26	AY29
UG: Feel a sense of belonging here.	5.27	5.38	5.40	5.42	5.45
Adult: Feel welcome here.	6.08	6.18	6.20	6.25	6.30
"I have a clear sense of belonging at USF."	UG	5.62	5.65	5.68	5.70
	Adult	5.92	5.94	5.97	6.00
	Online	5.98	6.10	6.13	6.15

Goals	Strategies	Milestones/Measures
4. Maintain a persistence and completion rate higher than our peer institutions in each of our student populations and for specific vulnerable populations.	1. Strengthen the RPC's collaboration across the organization to create clear pathways for student retention, persistence, and completion. 2. Fully implement ACE and Career Services "Student Success Center" – tracking impact on student success. 3. Highlight and market the value of living on campus. 4. Support first-generation students through First Year Transition, Foundations, SOAR, and specific clubs/programming.	• # Staff trained as CARE team members: • Annual reviews of retention and strategies to improve RPC to ExecCoun: • Percent alerts responded to within 24 hours: • Residence Hall Occupancy (Fa%) – • % FG students retained –

One-Year Persistence	Peer	A22	A23	A24	A25	A26	A27	A28
First Year	75.0%	71%	73%	74%	76%	78%	80%	82%
Transfer	-	73%	76%	74%	76%	80%	82%	84%
Degree Compl.	-	74%	72%	75%	76%	77%	78%	79%
Graduate/Doctoral	-	69/88	65/90	69/89	69/89	70/89	70/89	70/89
Students of Color F	-	67%	71%	67%	69%	72%	73%	75%
Students of Color T	-	66%	70%	66%	68%	70%	73%	75%
1st Gen Students	-	72%	69%	72%	73%	74%	75%	76%
Pell Eligible	-	62%	70%	63%	65%	67%	69%	70%

Completion Rates (150% of prog. time)	Reference – Sel. Prv.	A22	A23	A24	A25	A26	A27	A28
Freshmen	56%	65%	65%	65%	67%	68%	69%	70%
Transfer	69%	74%	78%	74%	74%	75%	75%	76%
Degree Completion	51%	77%	70%	77%	77%	78%	78%	78%
Graduate/Doctoral	-	79/74	83/78	79/74	79/74	80/75	80/75	81/76

Objective 2: Enhance the reputation and awareness of USF as a leading Catholic, Franciscan university with excellent student educational outcomes to increase the size of the student population.

Goals	Strategies	Milestones/Measures

1. Increase undergraduate and graduate applications.

Scholarship Competition	2022	2023	2024	2025	2026	2027	2028
# Participants	91	114	125	137	150	150	150
Financial Aid Processing	2022	2023	2024	2025	2026	2027	2028
# Undergrad FAFSAs	3619	3565	3600	3700	3800	3900	4000
# Graduate FAFSAs	971	809	900	950	1000	1000	1050

Strategies:

1. Market USF value, distinctiveness, and reputation to national audiences (brand evangelists, trend setters, voters in national rankings, etc.)

2. Market campus events including on social media – leveraging the Call Center and Saints Ambassadors for follow-ups.

Milestones/Measures:

- 3 *Engaging Mind & Spirit* issues per year.
- 3-5 *All Good Things* e-mails per year:
- Annual update of peer-evaluator list:

- # Call Center contacts:
- # Saints Amb. contacts:

2. Improve and increase USF's rankings in key national and international college reviews and quality listings.

	AY23	AY24	AY25	AY26	AY27	AY29
USN National Univ,	299	280	270	260	250	240
USN Social Mobility	167	93	90	87	85	83
USN Undergrad Nursing	356	319				
USN Online Bachelors	85/359					
USN Online Grad Bus	75/211					
USN Online MBA	124/344					
USN Online Grad Educ	58/329					
USN Online Grad Nurs	65/186					
Princeton Review	X					
Coll Consensus Score	#					
Wall Street Journal	#	130				

Strategies:

1. Expand USF's social media reach and impact highlighting specialized accreditations, "best rankings", employment opportunities and career placement.
2. Competitive analysis of top 10 peer institutions in each ranking to develop improvement plans.

Milestones/Measures:

- Update master listing of variables – Oct
- Annual plans to improve – May

- Competitive analysis of peers – Jan
- Annual plans to improve – May

3. Increase the percentage of alumni who philanthropically support the university.

Alumni Giving	FY23	FY24	FY25	FY26	FY27	FY28	FY29
Undergraduate	3.5%	3.5%	3.7%	3.9%	4.2%	4.5%	4.7%
Degree Completion	0.7%	0.7%	0.8%	1.0%	1.2%	1.3%	1.4%
Graduate	0.7%	0.7%	0.8	0.9%	1.1%	1.3%	1.5%
Overall	**1.6%**	1.7%	1.9%	2.1%	2.3%	2.5%	2.7%

Strategies:

1. Increase engagement from new alumni through events and communication.

2. Leverage academic departments to increase participation in events, alumni events, and scholarship giving.

Milestones/Measures:

- 3+ new alumni touchpoints/alum –
- >10% of new donors from touchpoints:
- Overall donor retention rate >40%:
- >10% increase in # giving post engagement:

Objective 3: Increase the quality of USF's academic and co-curricular programs – so that graduates of USF are prepared to contribute to the world through service and leadership.

Goals	Strategies	Milestones/Measures
1. Manage a broad portfolio of specialized accreditations, when accreditation is advantageous and validates program quality.	1. Analyze staffing levels and costs to achieve specialized accreditations. 2. Set priority list based on analysis. 3. Identify and recommend specific accreditation goal(s). 4. Reallocate funds and FTE positions to achieve goals.	• Update, as needed. • Revise/approve list, as needed. • Goals updated, as needed. • Annual updates provided to ExecCoun.

Higher Learning Commission	2028		
Council on Social Work Education	**2031**	Joint Rev Commission on Radiation Tech	2028
Accred Rev Committee on Ed for PA	2030	Council on Accr of Parks, Rec…(COApRT)	2029
Commission on College Nursing Ed	2030	The Illinois Certificate Board (Subst Ab)	2023
Accred Council for Bus Schools & Programs	2028		

Goals	Strategies	Milestones/Measures
2. Demonstrate consistent or increased student performance on key GenEd outcomes.	1. Provide resources to academic programs to improve student learning in Writing, Critical Thinking, and Information Literacy. 2. Track number of students seeking ACE support and resulting in passing grade. 3. Identify course-embedded assessments in Gen Ed courses and utilize rubrics.	• Assess Writing, Critical Thinking, and Info Lit each year? • # of passing students • Complete 3 course-embedded assessments/year:

	AY22	AY23	AY24	AY25	AY26	AY27	AY28
GEN ED OUTCOMES – Percentage of Students Meeting Benchmarks	#?	#?	80%	81%	83%	85%	87%

Goals	Strategies	Milestones/Measures
3. Demonstrate consistent or increased quality of academic and co-curricular programs.	1. Rationalize portfolio of academic programs based on mission, market viability, and quality. 2. Action plans to improve quality of academic programs with low quality scores. 3. Rationalize portfolio of co-curricular programs based on mission, quality, and student impact. 4. Action plans to improve measured learning outcomes of co-curricular programs.	• Executive Council review 5-year plan annually. • Annual assessment of actions plans for 3-5 targeted programs. • Executive Council review 5-year plan annually. • Annual assessment of actions plans for 2-3 targeted programs.

# Programs w/ Low Acad. Dashboard Scores	FY23	FY24	FY25	FY26	FY27	FY28	FY29
Viability Score < 6.0	16	16	14	12	10	10	10
Quality Score < 6.0	15	15	14	12	10	8	6

Engagement in Co-curricular Learning Activities (via "Suitable")	FY23	FY24	FY25	FY26	FY27	FY28	FY29
# Scholar-Athletes	106	108	111	115	119	124	130
% Residents	60%	65%	70%	75%	80%	85%	87%
% Commuters	18%	20%	25%	30%	33%	37%	40%
% First-year Students	85%	87%	89%	91%	93%	95%	95%
% All UG Students	23%	25%	30%	35%	40%	45%	50%

Goals	Strategies	Milestones/Measures
4. Provide high-quality academic programs and co-curricular learning opportunities that prepare graduates to contribute to the world through service and leadership.	1. Increase number of graduates who contribute to the world through service. 2. Increase the number of students served by the Career Success Center. 3. Increase the number of internships completed by our students. 4. Develop report of co-curricular measures of student learning outcomes. 5. Incorporate Catholic, Franciscan values, tenets, and intellectual tradition into general education while encouraging other academic programs to do the same. 6. Implement "Suitable" software to encourage student engagement.	• # alumni responding/referencing: • # of students served: • # of internships completed: • Report shared annually with ExecCoun. • # Programs integrating Franciscan values: • Track student engagement annually:

USF grads annually with experiential learning	A22	A23	A24	A25	A26	A27	A28	
Undergraduate (UG)	75%	#	76%	78%	80%	82%	84%	

Employment Rates - 6 months out	2022	2023	2024	2025	2026	2027	2028	2029
% UG employed in field	72%	73%	73%	74%	75%	76%	77%	78%
% DC employed in field	93%	94%	94%	94%	95%	95%	95%	95%
% GR employed in field	97%	98%	98%	98%	98%	99%	99%	99%

Licensure/Exam Pass Rates	2022	2023	2024	2025	2026	2027	2028	
Education	100%	100%	100%	100%	100%	100%	100%	
Nursing	88%	#	90%	92%	94%	96%	96%	
Radiation Therapy	75%	#	76%	78%	80%	82%	84%	
Business - CPA	53%	#	55%	57%	59%	61%	63%	

Objective 4: Strengthen the financial capacity and long-term sustainability of USF through enrollment growth, strategic investments, securing major grants and donations, and effective stewardship of resources.

Goals	Strategies	Milestones/Measures
1. Allocate resources to ensure academic program viability & quality of USF's mission-essential and market-driven programs – ensuring acceptable contribution margin (60% target) across the Colleges.	1. Identify from independent research, academic program dashboard, and other sources market-viable programs. 2. Identify historically under-enrolled courses (not required for GenEd, majors, or minors) to develop options/alternatives. 3. Provide facilities to enhance curricular and co-curricular programs - including accessibility of facilities.	• Review/revisit plan annually. • % of non-required courses with >50% available seats reduced by 5% each year. • Monitor CMP Project(s) Execution annually:

Contribution Margin	F22	F23	F24	F25	F26	F27	F28	F29
Arts & Sciences	47%	53%	53%	54%	55%	56%	56%	57%
Bus. & Health Admin	58%	59%	59%	60%	60%	61%	61%	61%
Education + REAL	58%	58%	59%	59%	59%	60%	60%	61%
Leach Nursing	55%	54%	54%	55%	55%	56%	56%	57%
PA – Albuquerque	66%	65%	38%	16%	39%	59%	61%	62%
Total	**54%**	**56%**	*56%*	*56%*	*57%*	*59%*	*59%*	*60%*

Goals	Strategies	Milestones/Measures
2. Increase scale and scope of revenue beyond traditional tuition revenue.	1. Provide assessment of overseas programs – including cost structures and viability. 2. Secure lead gifts for "A Shared Tomorrow" in silent phase of comprehensive campaign. 3. Strengthen and diversify philanthropic support. 4. Highlight and market the value on living on campus.	• Tri-annual program assessments. Vietnam BBA/MBA: FY24, Brno:FY25, China: FY26 • >40% of fundraising before public launch. • 35 new monthly individual connections per employee in Banner. • Grow donor base to >1500 donors: • Donor Retention Rate > 72% (>$1k): • Write 3 to 4 major grants a year with McAllister & Quinn – • # Residents (X/422):

Non-tuition & Int'l Revenue Sources ($M)	FY22	FY23	FY24	FY25	FY26	FY27	FY28	FY29
Overseas Partnerships	0.3	0.6	0.6	0.9	1.1	1.2	1.4	1.4
Room & Board	3.4	3.5	3.4	3.8	4.0	4.2	4.5	4.7
Grants (x/ HEERF)	1.5	3.9	3.5	3.7	3.0	3.0	3.0	3.0
HEERF	6.1	-	-	-	-	-	-	-
Unrestricted Contributions	1.1	2.1	1.1	1.2	1.3	1.4	1.5	1.6
Totals	**$12.4**	**$10.1**	*$8.6*	*$10.0*	*$9.4*	*$9.8*	*$10.4*	*$10.7*

Goals	Strategies	Milestones/Measures
3. Strengthen the balance sheet while constraining expense growth.	1. Review, Revise and implement procedures & policies relating to expenses. Credit card controls, account descriptions, etc. 2. Centralize tracking of contracts >$5k – for timely notifications of cancelations and re-bidding 3. Improve financial analysis by strengthening revenue and expense variance analysis. 4. Prioritize energy-saving initiatives that may result in cost savings.	• Annual review of CC holders and limits: • # reviews – with opportunities identified: • Reforecast of SOFP and SOA for Board 3X/year: • Measure the energy/cost savings annually.

Arvid Chart ($M)	FY22	FY23	FY24	FY25	FY26	FY27	FY28	FY29
Total Student Revenues	43.2	41.3	39.4	41.9	42.7	43.6	44.5	45.4
Total Operating Expenses	45.8	46.5	45.6	46.2	45.7	45.2	44.7	44.1
Net Cash from Operations	**(2.6)**	**(5.2)**	*(6.2)*	*(4.3)*	*(3.0)*	*(1.6)*	*(0.2)*	*1.2*

Endowment Funds ($M)	FY22	FY23	FY24	FY25	FY26	FY27	FY28	FY29
Unrestricted	11.5	12.1	12.5	12.8	13.2	13.6	14.0	14.4
With Donor Restrictions	15.2	15.6	16.1	16.6	17.0	17.6	18.1	18.6
Totals ($M)	**26.7**	**27.7**	*28.5*	*29.4*	*30.3*	*31.2*	*32.1*	*33.1*

Short-term Reserves ($M)	FY22	FY23	FY24	FY25	FY26	FY27	FY28	FY29
S/T Investments	12.3	12.3	12.5	13.0	13.5	14.0	14.5	15.0

Objective 5: Cultivate an environment that attracts, develops, and retains faculty, staff, and administrators, who embrace a culture of continuous improvement along with USF's mission and values.

Goals	Strategies	Milestones/Measures
1. Develop a strengths-based culture across all divisions by focusing on Employee Engagement. (see Q12 table below) *(Gallup Q12 benchmarks against other HE institutions.)*	1. Implement manager (including faculty department chairs) training. 2. Develop University-wide culture of servant leadership through strengths-based discussion at Cabinet, Executive Council, University Council, Academic Assembly, and ACS to learn how "to lead and to serve in the real world".	• Quarterly Supervisor/Leadership lunches: • Monthly "Leadership Lightbulbs" newsletters: • Develop New Manager Orientation by 06/2024. • 100% of New Managers completed NMO w/I 3 months of hiring/promotion:
2. Attract new employees to USF representative of diverse backgrounds and cultures. (see Diversity table below)	1. Actively encourage a diverse group of candidates to apply for position – posting on diverse job boards. 2. Provide formal training for hiring managers and employees serving on search committees.	• All postings include diverse sites: • 100% completion on "unconscious bias" training: • Annual "hiring manager" session to review talent acquisition process:

3. Retain employees and develop who exhibit a commitment to continuous improvement and USF's mission.
 	
 (see Turnover table below)
	1. Educate employees about range of available benefits and encourage utilization of such.
	 2. Promote professional development opportunities for all employees
		• Quarterly for benefits-eligible employees:
		   o Jan – Healthiest You:
		   o Apr – Retirement:
		   o Sep – Tuition Exchanges
		   o Nov – Benefits Fair
		 • Q12 % Actively Engaged/Disengaged: **FY23: 38/19**

4. Establish policies & procedures to ensure the safety of all personnel. (see Safety table below)	1. Update campus Emergency Operations Plan. 2. Review, revise, and implement a Continuity of Operations Plan. 3. Execute safety exercises annually or more often, as required by law (including fire drills, active shooter drills, etc.). 4. Annual Title IX and DEI Training for all employees.	• Record and communicate NIMS training program by Crisis Management Team position – annually. • Review COOP with Crisis Management Team – annually. • Review requirements and present timeline (by campus) to Crisis Management Team - Aug • Completed safety exercises recorded in Crisis Management Team meeting minutes – May. • % Employees completing training each year: **23:100%**

Goal 1 – Q12 Results – All Employees

Q12 Results – All Employees	FY23	FY24	FY25	FY26	FY27	FY28	FY29
Q00 – Grand Mean	**3.43**	3.48	3.53	3.58	3.63	3.68	3.72
Q01 – What's Expected	**4.18**	4.20	4.22	4.24	4.26	4.28	4.30
Q02 – Materials & Equipment	**3.51**	3.56	3.61	3.66	3.71	3.76	3.81
Q03 – Opportunity to Do My Best	**3.82**	3.84	3.86	3.88	3.90	3.92	3.94
Q04 – Recognition in last 7 days	**3.37**	3.42	3.47	3.52	3.57	3.62	3.67
Q05 – Supervisor/Someone Cares	**4.14**	4.16	4.18	4.20	4.22	4.24	4.26

Goal 2 – Diversity of New Employee Hires

Diversity of New Employee Hires	FY23	FY24	FY25	FY26	FY27	FY28	FY29
# of New Hires – excluding adjuncts	**44**						
% Non-white	**41%**	40%	40%	40%	40%	40%	40%
# of New Hires – adjuncts only	**22**						
% Non-white	**18%**	20%	21%	24%	27%	30%	33%

Goal 3 – Employee Turnover Ratio – excluding retirees.

Employee Turnover Ratio – excluding retirees.	FY23	FY24	FY25	FY26	FY27	FY28	FY29
FT Faculty Turnover	**13%**	5%	5%	5%	5%	4%	4%
FT Staff/Administrator Turnover	**17%**	15%	15%	13%	13%	13%	13%
All FT Employees Turnover	**16%**	11%	11%	10%	10%	10%	10%

Goal 4 – Safety

	FY23	FY24	FY25	FY26	FY27	FY28	FY29
% employees trained in Run-Hide-Fight	**40%**	65%	70%	75%	80%	85%	90%
# of safety exercises performed annually	**2**	2	4	4	5	5	5
% FT employees w/ current "Mental Health First Aid" (MHFA) certification	**-**	25%	40%	50%	55%	60%	65%
Annual Title IX & DEI - adjuncts	**-**	70%	75%	80%	85%	90%	95%
Annual Title IX & DEI – X/ adjuncts	**100%**	100%	100%	100%	100%	100%	100%