University Strategic Alignment Process Report
Indiana University – Purdue University Fort Wayne
Accounting and Finance
Part I

1. What does your unit do and how does it support the mission of the university?

Our department mission statement is to facilitate the academic and professional success of our students through excellence in teaching, intellectual contributions, and service to our constituents. Specifically, our department offers the following four academic programs: Majors in both Accounting and Finance, a Post-baccalaureate Certification in Accounting, and a Certificate in Bank Management.

As you will see throughout the report we support the mission of the school through our efforts to assure student success, scholarly activity and engagement with the community.

<table>
<thead>
<tr>
<th>RUBRIC</th>
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</thead>
<tbody>
<tr>
<td>To what extent was evidence provided to demonstrate how well the unit supports the mission statement of the University?</td>
</tr>
<tr>
<td>The unit did not provide evidence of their support of the mission statement.</td>
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</tbody>
</table>

 TASK FORCE COMMENTS AND/OR QUESTIONS:

2. Please list significant accomplishments from the last fiscal year not included in your goals.

PUBLICATIONS:

PRESENTATIONS:
• **Chang**: “The Role of Think Tanks in the US Conservative Movement,” Keynote speech delivered at the International Conference on Think Tanks and Public Policies, Hebei Academy of Social Science, Shijiazhuang, China, October 13, 2015.

• **Kauffman**: “A Primer in the Key Issues Facing College Faculty and Lecturers,” 2015 FALCON Conference, hosted by the Indiana University Faculty Colloquium on Excellence in Teaching (FACET).

• **Kauffman**: “How Learning Emotions and the ARCS Model of Motivational Design Enhance Learning and Improve Critical Thinking,” 2015 Scholarship of Teaching and Learning (SoTL) Commons Conference (2015)

• **Slaubaugh**: “The Effect of Social Culture on Individual Investment Decisions”, Presented by Karen Leonard, University of Arkansas at Little Rock, Mike Slaubaugh, Indiana University - Purdue University Fort Wayne; Annual Conference of the Institute of Behavioral and Applied Management (IBAM) in Pittsburgh, PA on October 9, 2015.

**CAMPUS SERVICE:**

• **Chang**: Member of Senate Subcommittee on Athletics, 2015-2018

• **Chang**: IPFW Human Resources, Neutral Conflict Resolution Representative, 2015

• **Kauffman**: Several presentations or projects related to teaching.

• **Hanke**: Member Budgetary Affairs Subcommittee (Spring 2015)

• **Di**: Member Budgetary Affairs Subcommittee

• **Minke**: Mentored three honors students (two are Doermer Scholars, the other is a Chapman Scholar) to be their faculty advisor for their honors project. These are 2-year projects and involve helping the students with their topic development, research and presentation help.

• **Pollock**: Serve on Faculty Senate, Executive committee, Student Affairs committee, University Resource Planning committee, Board of director and treasurer Communicator, USAP, Phi Kappa Phi President, probably a couple of others that I have forgotten about.

**COMMUNITY SERVICE:**

• **Chang**: Northeast Indiana Innovation Center, Special Events Committee, 2013-present.

• **Kauffman**: Taught a 90-minute continuing legal education seminar for the Allen County Bar Association. Title: “Legal Ethics in a Cyber World: Law Practice Pointers Concerning the Internet and Social Media.” 2015.

• **Kauffman**: At the beginning of each semester, I invite representatives from the Allen County Junior Achievement Organization to make presentations to students, inviting them to volunteer in Junior Achievement’s in-school program during the semester. Again this year, between 5-10 students volunteered and completed their commitments.

• **Hanke**: Contact person for the VITA (Voluntary Income Tax Assistance) program at IPFW. My responsibility is to direct individuals who contact the department for individual tax preparation assistance to the Allen County VITA sites where they can receive assistance beginning in February. I also provide students with information on how they can volunteer to help prepare tax returns within the VITA program.

• **Minke**: Institute of Internal of Auditors Ft Wayne Chapter Board Member, 2015

• **Minke**: IPFW/High School Dual Credit Program

• **Minke**: Faculty Coordinator for all the Accounting and Finance Co-Op Student

• **Minke**: Financial consulting for two businesses in Ft Wayne – Plastics CompositesCorporation and JAM Impressions, Inc.

• **Minke**: Treasurer for Kiddie Prep School, a large day care at Grace Point Church of the Nazarene (Deb Hughes, Director), with budgeting, financial statement and other financial responsibilities since 2009 The organization has a $1,200,000 annual budget and I continue to serve.
- **Minke:** Beginning, December, 2012, I was invited to be on the Finance Committee of the Ft. Wayne Community Harvest Food Bank (David Fee, Chair) and continue to serve.
- **Minke:** In June, 2013, I was asked to be on the Finance Committee of Grace Point Church of the Nazarene (Ron Turpin, Chair) with budgeting and financial statement review responsibilities. The Church has a $2,000,000 annual budget and I continue to serve.
- **Reffeitt:** Presented at Northrop High School to an Economics class information related to Bank Simulation class offered at IPFW.
- **Miller:** Elected to serve as Secretary of the Local ACFE Chapter for the 2nd Year
- **Miller:** Charter member of the local ACFE Chapter and Hosted a Board Meeting of the Chapter Members.

**Student Success**
- CPA exam pass rates exceed national averages and are competitive with other public schools in Indiana.

### RUBRIC

<table>
<thead>
<tr>
<th>To what extent did the unit provide evidence that accomplishments align with the mission of the University? (Only include accomplishments that are not included with goals)</th>
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**TASK FORCE COMMENTS AND/OR QUESTIONS:**

3. What program-specific accreditations or federal & state laws impact what you do?

Accreditations: Maintenance of AACSB International – provides incentives to have a strategic plan, perform meaningful assessments of learning, and standards for teaching qualifications as well as minimum percentages of PhDs teaching courses. We are currently staffed as thinly as possible and yet maintain the required minimum percentages. Any further cuts in our Tenure/tenure track faculty would put continuing accreditation at risk. Without accreditation recruiting good tenure track faculty would be extremely difficult in accounting and finance since a lack of accreditation implies a weak and underfunded program.

State law: The accounting major is affected by Indiana CPA exam requirements – currently candidates need 24 credit hours in accounting with 12 hours required in specific topics. Candidates also must have, at a minimum, an undergraduate degree and 150 credit hours in total to be eligible for the exam. Many states across the nation have begun to require both additional hours (more than 24) in accounting, as well as courses in specific
topics, such as Communication Skills for Accountants and/or Ethics in Accountings. If Indiana makes similar changes our department will have significant issues in finding the resources needed to develop and teach these courses.

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<td>To what extent did the unit evaluate the impact of accreditation constraints and/or benefits?</td>
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<td>The program has (or is working toward) accreditation but did not provide any information regarding constraints and/or benefits.</td>
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<td>To what extent did the unit identify and analyze how Federal/State laws and/or mandates impact the unit?</td>
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| TASK FORCE COMMENTS AND/OR QUESTIONS: |

4. Upon review of your department data, are there any data you wish to comment on or contextualize? (Note: Populated metrics will be distributed to departments in January.)

On the whole we generate about a million dollar surplus per year in contribution to overhead costs. **Of concern is that the report does not include our 35 Certificate program students.** These students are basically accounting majors with a prior undergraduate degree in another field. They require absolutely no additional resources and are simply included in our major classes. If these students were included our cost per major would drop almost a thousand dollars to $4,896 and with 18 graduates included our cost per degree drops over four thousand dollars to $13,911.

Of note is that in 2006 (before 2008-2011 bubble) we had 176 majors and 198 as of 2014 this is an increase of almost 14%. We are especially proud that we are serving this increase with one less faculty member (we were not allowed to replace a retiree from two years ago). Also, not reflected in the department data is that LTL costs used to run
about $16,000 per year and currently is around $40,000. This trend is one of the issues that may potentially affect accreditation in the future.

Almost 75% of our students are accounting majors. Therefore, of special concern, is that fact that four of the six accounting faculty are within five years of either full or partial retirement. The last time we were looking for a PhD in accounting we received only 15 qualified (actually had a PhD) applications. We are deeply worried about replacing these faculty with qualified candidates in the next five to seven years.

5. Who provides advising to your students? (Please check as many as apply)
   ☐ Faculty  ☐ Peer  ☒ Professional  ☐ N/A

6. Are your students required to meet with an advisor each semester?
   No
   Comments: Our department meets informally with students to provide guidance in relation to career choices and professional development. See goal 1 for a new program started this year.

7. Does your department have formal advising policies that are to be followed?
   No

8. Do you collect employment data for your graduates?
   No

9. If you answered “Yes” to Question #8, what % of your graduates from the last academic year (2014-2015) are employed in their field of study or enrolled in another educational program? NOTE: If you do not collect this data by department, we will refer to Destination Survey: http://www.ipfw.edu/microsites/usap/destination-survey/index.html.
   Click here to enter text.
10. If you reported data in question #9, how was this data collected?

Click here to enter text.

11. Upon review of your department data as reflected in the Destination Survey, are there any data you wish to comment on or contextualize? To view this report, visit:

Yeah! Given the goal of professional programs is to get graduates into the workforce we are quite pleased to see 70% working fulltime with an additional 11% seeking additional education or working part-time. In our own department’s “who do we know went where” analysis most of the reported 70% would be in the field. As mentioned above you need 150 credit hours for the CPA exam so the 11% likely represent students seeking the additional 30 credits required to sit for the exam.

12. Upon review of your department data as reflected in the Employment Demand Report, are there any data you wish to comment on or contextualize? To view this report, visit:

Accounting and auditing is number 2! We also provide degrees that would work for cost estimators (11th), financial managers (16th), personal financial advisors (45), financial analysts (57) and loan officers (59). Given that we graduate about 50 accounting majors per year and demand for the next five years is projected at 1,000 IPFW has a significant opportunity to at least partially fulfill the area’s needs.

13. Do you wish to provide any response to last year’s task force comments?

Yes, thanks. You will see adjustments to our goals from those comments.

14. Please list the names of the authors of this USAP report.

Kathy Pollock and Janet Papiernik
Part II

Instructions: Report the status of goals created last year and add any new goals in order to have a minimum of three and no more than five “currently active” goals that you are working on. Currently active goals include goals from last year that you are still working on plus any new goals you are adding this year. Part 2 is pre-populated with last year’s goals along with space to report on up to five new goals. For example, if your unit had 8 goals last year, your report will come with space to report on up to 13 goals total (8 from last year + 5 potentially new goals). In the event that you have completed or eliminated last year’s goals you will add 3-5 entirely new goals, hence the space for five additional goals.

The task force determined that in the interest of aligning resources to strategic priorities, it is best to focus on 3-5 goals for each unit and that those goals should include a mix of maintenance and aspirational goals. Goals that were reported last year and are now completed or eliminated do not count in this number (although you will be asked to provide an update). We recognize that you may be required to eliminate goals from last year’s report simply to fit within the limit and it is up to units to decide which 3-5 they wish to focus and report on. Highly strategic units may very well have more than 5 goals they are working towards but the task force requests that you identify which of those are “active” for USAP-purposes. Leave any unused goals blank.

Note: In the first year, each unit that was directly responsible for student learning (whether the unit was academic or academic support) included at least ONE unit goal (among its other goals) that aligned with EITHER Goal I.A.1 or I.A.2. For this year, each unit directly responsible for students (whether the unit is academic or academic support) should include at least ONE unit goal (among its other goals) that aligns with Metric 1.M.1 and associated outcomes, focused on improving retention and graduation rates.
Goal 1

1. Enter a unit goal:

   Improve retention of accounting and post-baccalaureate students by reducing the number of students who need to retake one or more of their upper level (300 and above) Accounting courses.

2. Status of goal:

   ☐ Completed   ☐ Eliminated   ☐ Modified   ☒ In Process   ☐ New

3. If goal has been completed, what was the impact on your unit and Plan 2020?

   Click here to enter text.

   **If this goal was completed, skip to the next goal.**

4. If eliminated or modified, state reason:

   ☐ No funding for supplies and expenses   ☐ Priorities shifted
   ☐ No funding for salary & wages   ☐ Loss of staffing
   ☐ No funding for equipment / maintenance of equipment
   ☐ Other:  If ‘Other’, click here to explain.

   **If this goal was eliminated, skip to the next goal.**

5. Type of goal:

   ☐ Create/Develop   ☐ Eliminate/Discontinue   ☒ Improve/Enhance
   ☐ Increase Efficiency   ☐ Maintain   ☐ Stretch
   ☐ Other:  If ‘Other’, click here to explain.
6. How does your unit goal align with Plan 2020 Goals, Metrics & Outcomes?

Using the Plan 2020 Coding document, identify which three Plan 2020 goals, metrics or outcomes best align with your unit goal. Please make only one selection for each row, using the appropriate drop-down menu based on the Plan 2020 Goal area you want to align with.

Plan 2020 is structured around four goal areas: I – Student Success, II – Creation, Integration and Application of Knowledge, III – Regional Activities, and IV – Creating a Stronger University. You may find that your unit goal aligns to multiple Plan 2020 goals and at different levels, and that is fine. Please choose goals at the lowest level only. (For example, if you have a unit goal focused on building a relationship with a regional partner, you only need to choose I.E.3 and not I.E. or I. Conversely, if you have a unit goal that aligns with student success but doesn’t really have an applicable lower-level goal, choose I – Student Success.)

Note: In the first year, each unit that was directly responsible for student learning (whether the unit was academic or academic support) included at least ONE unit goal (among its other goals) that aligned with EITHER Goal I.A.1 or I.A.2. For this year, each unit directly responsible for students (whether the unit is academic or academic support) should include at least ONE unit goal (among its other goals) that aligns with Metric 1.M.1 and associated outcomes, focused on improving retention and graduation rates.

Select up to three Plan 2020 Goals to align with. Choose only one goal for each row.

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<tr>
<th>1st Plan 2020 Goal</th>
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<th>Area II Goals</th>
<th>Area III Goals</th>
<th>Area IV Goals</th>
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<tbody>
<tr>
<td>I.B.4</td>
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<th>Area III Goals</th>
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<tr>
<td>I.A.2</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
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<th>Area II Goals</th>
<th>Area III Goals</th>
<th>Area IV Goals</th>
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<td>Choose an item.</td>
<td>Choose an item.</td>
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7. Is the unit goal a high, medium or low priority?

High

8. Why is this goal important to your unit, the university or both?

Should improve retention of students as well as improve their learning.
9. If continuing your goal, what progress have you made or which action steps have been completed?

Audit process included the following:

1. Review the transcript of each student, noting the grade received in the Principles of Accounting I and II classes (A201 and A202).
2. Grades earned in other courses were also noted. I especially looked at grades earned in the math courses taken along with pre-business classes, including Econ 201 and 202.
3. Based on the review of the transcripts, and noting grades and typical course loads, I then examined the course schedule for Fall which was the semester that they were planning to take A311.
4. I especially noted the course load for each student. The goal was to avoid taking more than two accounting courses at the same time, and for those students taking two accounting courses along with F301, it drew a red flag in my mind.
5. I emailed or called approximately one-third of the students to discuss their schedules. Every student that I talked to, very much appreciated my suggestions and concerns. Almost all of the students that I contacted did change their schedule in some way (switching out a course or reducing credit hours to be taken overall).

Referring to the results in the table below, it didn’t appear as if my efforts made a difference, however, on a student-by-student basis, I know that my efforts did make a difference. I know for a fact that although some of the students did not adjust their course schedules, they did adjust their outside work schedules. For those students that appeared to be okay with their course load, I discovered later that their outside work schedules were very demanding, and thus, they did not succeed in passing the course.

For the Spring 2016 class, I only contacted two students. One of them dropped the class as her schedule was very overloaded, and the second student decided not to change his schedule, but did appreciate my input. This student is actually doing very well in the course, but he has no outside commitments.

Because certain classes will be stronger than others, it is difficult for me to really measure the true success of my efforts. Through my review of the student transcripts, I knew that my Fall 2015 class was fairly strong. I also know that the Spring 2016 class is also fairly strong.

I believe that I need to have more data to see if there is a trend that can be established. Meanwhile, I plan to contact a higher percentage of students as I move forward just because it gave me an opportunity to establish a rapport with each student in advance of the class. By the time that I began the class in the Fall, I felt that I already knew about a third of the class. I think for those students, they were more comfortable in coming to me to discuss any issues that they may have had during the semester.
<table>
<thead>
<tr>
<th>Semester A311 Offered</th>
<th>Number of Students</th>
<th>Grade Point for this Class</th>
<th>Pass Rate</th>
<th>Retakes Included</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall 2013</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>-01</td>
<td>29</td>
<td>2.3</td>
<td>44.8%</td>
<td></td>
</tr>
<tr>
<td>-02</td>
<td>21</td>
<td>1.94</td>
<td>57.1%</td>
<td></td>
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<tr>
<td>Spring 2014</td>
<td></td>
<td></td>
<td></td>
<td>9</td>
</tr>
<tr>
<td>-01</td>
<td>21</td>
<td>2.0</td>
<td>57.1%</td>
<td></td>
</tr>
<tr>
<td>-02</td>
<td>16</td>
<td>2.5</td>
<td>62.5%</td>
<td></td>
</tr>
<tr>
<td>Fall 2014</td>
<td></td>
<td></td>
<td></td>
<td>11</td>
</tr>
<tr>
<td>-01</td>
<td>32</td>
<td>1.97</td>
<td>50.0%</td>
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<tr>
<td>-02</td>
<td>20</td>
<td>1.86</td>
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<tr>
<td>Spring 2015</td>
<td></td>
<td></td>
<td></td>
<td>11</td>
</tr>
<tr>
<td>-01</td>
<td>21</td>
<td>2.16</td>
<td>66 2/3%</td>
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<tr>
<td>-02</td>
<td>11</td>
<td>2.14</td>
<td>45.5%</td>
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<tr>
<td>Fall 2015</td>
<td></td>
<td></td>
<td></td>
<td>4</td>
</tr>
<tr>
<td>-01</td>
<td>26</td>
<td>2.35</td>
<td>57.7%</td>
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</tr>
<tr>
<td>-02</td>
<td>20</td>
<td>2.0</td>
<td>66 2/3%</td>
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</table>

10. What action(s) does your unit plan to take to support this unit goal?

See above. Also, as a part of this process, we identified the A201 Intro to Financial Accounting, A202 Intro to Managerial Accounting, and F301 Financial Management as bottlenecks in the business school for which our department is responsible. We have begun several new plans to address this issue including posting cross-listed office hours on Blackboard for courses taught by multiple faculty and hiring an LTL to provide free tutoring to students in all three courses. The LTL had over 75 students visit him last fall.

**RUBRIC**

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<tr>
<th>Do the unit goals align with the University’s goals?</th>
<th>Goal does not align with the University’s goals.</th>
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<th>The goal is clearly aligned with the University’s goals.</th>
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**TASK FORCE COMMENTS AND/OR QUESTIONS:**
11. With what metrics will you assess progress toward accomplishing this unit goal on an annual basis?

- See above for A311.
- For the new tutoring initiative we will compare drop/fail rates before and after implementing this initiative. Success would be marked by at least covering the cost of the LTL with “kept” tuition fees.

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<td>Are clearly stated performance measures provided for each goal? (Performance measures are considered ‘clearly stated’ if a benchmark and quantitative measurement is included).</td>
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</table>

**TASK FORCE COMMENTS AND/OR QUESTIONS:**

12. Are you able to accomplish this unit goal with your current monetary and staffing resources?

Yes

13. If you answered “Yes” to Question #12 and you have the current resources needed to accomplish this goal, how will you use your resources?

Simple allocation of time to review student schedules and meet with those that may be at risk. The tutor does involve a small cost of $2,200.

14. If you are reallocating your current resources to accomplish this goal, please explain what specific resources will be reallocated.

Less time spent on research and other service activities

15. If you answered “No” or “Partial” to Question #12, what are you able to accomplish without additional resources?
Currently the dean’s office is paying for the tutor. If that funding is pulled we would not be able to continue that program.

16. If you answered “No” or “Partial” to Question #12, what additional resources do you need to fully accomplish this unit goal? Provide specific dollar amounts.

CUL - # of positions needed
Benefited

S & W — Recurring
Non Recurring

S & E — Recurring
Non Recurring

Equipment — Recurring
Non Recurring

Other: Describe:

Other — Recurring
Non Recurring

17. If you were to receive the additional resources outlined in question #16, how will they be used?

Click here to enter text.
18. What challenges or constraints, other than financial (i.e. federal or state mandates, accreditations, university policy), might affect your progress toward accomplishing this unit goal?

Only if funding if pulled on the tutoring before we have a chance to fully try to make a difference in student success and retention. We could try to address it by using more student tutors via CASA programs but we always have problems finding enough qualified students willing to do this work.

19. What is your timeline for accomplishing this goal?

3-5 years

Dates: We should be able to work out bugs and determine overall success of these two initiatives within three years. The overall goal would be to see improved retention and fewer repeats of courses in comparing 2014 to 2017 in the key courses listed above.
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<tr>
<td>Are time frames included for each performance measure (metric)?</td>
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<tr>
<td>No time frames are included with the performance measures.</td>
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<tr>
<td>Some of the performance measures include time frames.</td>
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<tr>
<td>All performance measures include time frames.</td>
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**TASK FORCE COMMENTS AND/OR QUESTIONS:**

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Goal 2

1. Enter a unit goal:
   Improve placement of Accounting and Finance (A&F) students, through department initiatives and promotion of employing a placement director.

2. Status of goal:
   □ Completed   ☒ Eliminated   □ Modified   □ In Process   □ New

3. If goal has been completed, what was the impact on your unit and Plan 2020?
   Click here to enter text.
   **If this goal was completed, skip to the next goal.**

4. If eliminated or modified, state reason:
   □ No funding for supplies and expenses   □ Priorities shifted
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   □ Other: If ‘Other’, click here to explain.
   **If this goal was eliminated, skip to the next goal.**

5. Type of goal:
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   □ Increase Efficiency   □ Maintain   □ Stretch
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6. How does your unit goal align with Plan 2020 Goals, Metrics & Outcomes?

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<td>Choose an item.</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
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</tbody>
</table>

7. Is the unit goal a high, medium or low priority?

Click here to choose.

8. Why is this goal important to your unit, the university or both?

Click here to enter text.
9. If continuing your goal, what progress have you made or which action steps have been completed?

Click here to enter text.

10. What action(s) does your unit plan to take to support this unit goal?

Click here to enter text.

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**TASK FORCE COMMENTS AND/OR QUESTIONS:**

11. With what metrics will you assess progress toward accomplishing this unit goal on an annual basis?

Click here to enter text.

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**TASK FORCE COMMENTS AND/OR QUESTIONS:**

12. Are you able to accomplish this unit goal with your current monetary and staffing resources?

Click here to choose.
13. If you answered “Yes” to Question #12 and you have the current resources needed to accomplish this goal, how will you use your resources?

Click here to enter text.

14. If you are reallocating your current resources to accomplish this goal, please explain what specific resources will be reallocated.

Click here to enter text.

15. If you answered “No” or “Partial” to Question #12, what are you able to accomplish without additional resources?

Click here to enter text.

16. If you answered “No” or “Partial” to Question #12, what additional resources do you need to fully accomplish this unit goal? Provide specific dollar amounts.

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<tbody>
<tr>
<td>Select Yes/No</td>
<td></td>
</tr>
</tbody>
</table>

| S & W — Recurring          | Select Yes/No | $$: Click here to enter amount. |
| Non Recurring              | Select Yes/No | $$: Click here to enter amount. |

| S & E — Recurring          | Select Yes/No | $$: Click here to enter amount. |
| Non Recurring              | Select Yes/No | $$: Click here to enter amount. |

| Equipment — Recurring      | Select Yes/No | $$: Click here to enter amount. |
| Non Recurring              | Select Yes/No | $$: Click here to enter amount. |

Other: Describe: Click here to enter text.
17. If you were to receive the additional resources outlined in question #16, how will they be used?

Click here to enter text.

| RUBRIC |
|------------------------------|------------------|-------------------|-----------------------------|
| Are clearly stated budget plans included for each goal? (A budget plan is considered ‘clearly stated’ if it includes an amount and the funding source.) | No budget information is provided. | Budget plan is included but is not clearly stated. | Goal has a clearly stated budget plan. |

18. What challenges or constraints, other than financial (i.e. federal or state mandates, accreditations, university policy), might affect your progress toward accomplishing this unit goal?

Click here to enter text.

| RUBRIC |
|------------------------------|------------------|-------------------|-----------------------------|
| Are clearly stated challenges identified for each goal? (A challenge is ‘clearly stated’ if it is explained in detail along with a contingency plan to overcome the challenge). May not pertain to each goal. | Challenges are not included in the unit's report. | Challenges are listed but they are not clearly stated. | Clearly stated challenges are included for this goal. |
19. What is your timeline for accomplishing this goal?

Click here to choose.

Dates:  Click here to enter text.

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</tr>
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<td>frames.</td>
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**TASK FORCE COMMENTS AND/OR QUESTIONS:**
Goal 3

1. Enter a unit goal:

   Enhance the success of finance majors by improving the promotion, quality, and delivery of the program by creating a director of finance position

2. Status of goal:

   □ Completed    ☒ Eliminated    □ Modified    □ In Process    □ New

3. If goal has been completed, what was the impact on your unit and Plan 2020?

   Click here to enter text.

   **If this goal was completed, skip to the next goal.**

4. If eliminated or modified, state reason:

   □ No funding for supplies and expenses    □ Priorities shifted
   ☒ No funding for salary & wages    ☐ Loss of staffing
   □ No funding for equipment / maintenance of equipment
   ☒ Other:   Even though this proposal would have only cost $2,200 per year our dean refused to even consider it. We had hoped that between recruitment, retention and placement our finance program would have become much stronger and larger (approximately 10 to 15 more students by 2020). Obviously if we had hit that goal it would have more than paid for itself. And if not, easily discontinued.

   **If this goal was eliminated, skip to the next goal.**
5. Type of goal:

☐ Create/Develop   ☐ Eliminate/Discontinue   ☐ Improve/Enhance
☐ Increase Efficiency   ☐ Maintain   ☐ Stretch
☐ Other: If ‘Other’, click here to explain.

6. How does your unit goal align with Plan 2020 Goals, Metrics & Outcomes?

Using the Plan 2020 Coding document, identify which three Plan 2020 goals, metrics or outcomes best align with your unit goal. Please make only one selection for each row, using the appropriate drop-down menu based on the Plan 2020 Goal area you want to align with.

Plan 2020 is structured around four goal areas: I – Student Success, II – Creation, Integration and Application of Knowledge, III – Regional Activities, and IV – Creating a Stronger University. You may find that your unit goal aligns to multiple Plan 2020 goals and at different levels, and that is fine. Please choose goals at the lowest level only. (For example, if you have a unit goal focused on building a relationship with a regional partner, you only need to choose I.E.3 and not I.E. or I. Conversely, if you have a unit goal that aligns with student success but doesn’t really have an applicable lower-level goal, choose I – Student Success.)

Note: In the first year, each unit that was directly responsible for student learning (whether the unit was academic or academic support) included at least ONE unit goal (among its other goals) that aligned with EITHER Goal I.A.1 or I.A.2. For this year, each unit directly responsible for students (whether the unit is academic or academic support) should include at least ONE unit goal (among its other goals) that aligns with Metric 1.M.1 and associated outcomes, focused on improving retention and graduation rates.

Select up to three Plan 2020 Goals to align with. Choose only one goal for each row.

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<tr>
<th></th>
<th>Area I Goals</th>
<th>Area II Goals</th>
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<td>Choose an item.</td>
<td>Choose an item.</td>
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<tr>
<td>2&lt;sup&gt;nd&lt;/sup&gt; Plan 2020 Goal</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
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<td>Choose an item.</td>
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<tr>
<td>3&lt;sup&gt;rd&lt;/sup&gt; Plan 2020 Goal</td>
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7. Is the unit goal a high, medium or low priority?
   Click here to choose.

8. Why is this goal important to your unit, the university or both?
   Click here to enter text.

9. If continuing your goal, what progress have you made or which action steps have been completed?
   Click here to enter text.

10. What action(s) does your unit plan to take to support this unit goal?
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</table>

11. With what metrics will you assess progress toward accomplishing this unit goal on an annual basis?
    Click here to enter text.
RUBRIC

Are clearly stated performance measures provided for each goal? (Performance measures are considered ‘clearly stated’ if a benchmark and quantitative measurement is included).

- The unit provided performance measures but they are not clearly stated.
- Some of the stated performance measures are clearly stated.
- All performance goals are clearly stated.

TASK FORCE COMMENTS AND/OR QUESTIONS:

12. Are you able to accomplish this unit goal with your current monetary and staffing resources?

   Click here to choose.

13. If you answered “Yes” to Question #12 and you have the current resources needed to accomplish this goal, how will you use your resources?

   Click here to enter text.

14. If you are reallocating your current resources to accomplish this goal, please explain what specific resources will be reallocated.

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15. If you answered “No” or “Partial” to Question #12, what are you able to accomplish without additional resources?

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16. If you answered “No” or “Partial” to Question #12, what additional resources do you need to fully accomplish this unit goal? Provide specific dollar amounts.

   CUL - # of positions needed  
   Benefited

   Click here to enter text.

   Select Yes/No
S & W — Recurring  Select Yes/No  $$: Click here to enter amount.
Non Recurring  Select Yes/No  $$: Click here to enter amount.

S & E — Recurring  Select Yes/No  $$: Click here to enter amount.
Non Recurring  Select Yes/No  $$: Click here to enter amount.

Equipment — Recurring  Select Yes/No  $$: Click here to enter amount.
Non Recurring  Select Yes/No  $$: Click here to enter amount.

Other: Describe:  Click here to enter text.

Other — Recurring  Select Yes/No  $$: Click here to enter amount.
Non Recurring  Select Yes/No  $$: Click here to enter amount.

17. If you were to receive the additional resources outlined in question #16, how will they be used?

Click here to enter text.

| RUBRIC |
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| Are clearly stated budget plans included for each goal? (A budget plan is considered ‘clearly stated’ if it includes an amount and the funding source.) | No budget information is provided. | Budget plan is included but is not clearly stated. | Goal has a clearly stated budget plan. |

18. What challenges or constraints, other than financial (i.e. federal or state mandates, accreditations, university policy), might affect your progress toward accomplishing this unit goal?

Click here to enter text.
### RUBRIC

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### TASK FORCE COMMENTS AND/OR QUESTIONS:

19. What is your timeline for accomplishing this goal?

   Click here to choose.

   Dates:  Click here to enter text.

### RUBRIC

<table>
<thead>
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<th>Are time frames included for each performance measure (metric)?</th>
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### TASK FORCE COMMENTS AND/OR QUESTIONS:
Goal 4

1. Enter a unit goal:
   
   Give graduating accounting majors an exit exam that covers basic topics from all required courses.

2. Status of goal:
   
   ☐ Completed   ☐ Eliminated   ☐ Modified   ☒ In Process   ☐ New

3. If goal has been completed, what was the impact on your unit and Plan 2020?
   
   Click here to enter text.

   **If this goal was completed, skip to the next goal.**

4. If eliminated or modified, state reason:
   
   ☐ No funding for supplies and expenses   ☐ Priorities shifted
   ☐ No funding for salary & wages   ☐ Loss of staffing
   ☐ No funding for equipment / maintenance of equipment
   ☐ Other:  If ‘Other’, click here to explain.

   **If this goal was eliminated, skip to the next goal.**

5. Type of goal:
   
   ☐ Create/Develop   ☐ Eliminate/Discontinue   ☒ Improve/Enhance
   ☐ Increase Efficiency   ☐ Maintain   ☐ Stretch
   ☐ Other:  If ‘Other’, click here to explain.
6. How does your unit goal align with Plan 2020 Goals, Metrics & Outcomes?

Using the Plan 2020 Coding document, identify which three Plan 2020 goals, metrics or outcomes best align with your unit goal. Please make only one selection for each row, using the appropriate drop-down menu based on the Plan 2020 Goal area you want to align with.

Plan 2020 is structured around four goal areas: I – Student Success, II – Creation, Integration and Application of Knowledge, III – Regional Activities, and IV – Creating a Stronger University. You may find that your unit goal aligns to multiple Plan 2020 goals and at different levels, and that is fine. Please choose goals at the lowest level only. (For example, if you have a unit goal focused on building a relationship with a regional partner, you only need to choose I.E.3 and not I.E. or I. Conversely, if you have a unit goal that aligns with student success but doesn’t really have an applicable lower-level goal, choose I – Student Success.)

Note: In the first year, each unit that was directly responsible for student learning (whether the unit was academic or academic support) included at least ONE unit goal (among its other goals) that aligned with EITHER Goal I.A.1 or I.A.2. For this year, each unit directly responsible for students (whether the unit is academic or academic support) should include at least ONE unit goal (among its other goals) that aligns with Metric 1.M.1 and associated outcomes, focused on improving retention and graduation rates.

Select up to three Plan 2020 Goals to align with. Choose only one goal for each row.

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7. Is the unit goal a high, medium or low priority?

High

8. Why is this goal important to your unit, the university or both?

Student success is measured by student learning, therefore important to both our department and university.
9. If continuing your goal, what progress have you made or which action steps have been completed?

We have selected and imbedded a number of questions into the A424 Auditing comprehensive final exam that cover four (including auditing itself) of the required courses of the program. Three of the courses are prerequisites of A424. We plan to analyze these results this summer.

10. What action(s) does your unit plan to take to support this unit goal?

**BASIC ACTIONS**

- Review syllabi from required courses, with emphasis on learning objectives of the courses: Partially completed
- Work with faculty on establishing list of priority topics: Partially completed
- Exam to be administered during the Auditing course (BUS A424) which is required of all accounting majors near the end of the program. (Partially completed)
- Determine implementation date (Spring 2016)

**DEVELOPMENT**

- Develop rubric of topics covered and corresponding level of coverage (high, medium, low)
- Determine appropriate length and format of exam (in process)
- Develop exam questions (in process)
- Consider using pretests in each required course to give baseline for assessment of progress. (on hold)

**EVALUATION**

- By all accounting faculty
- Review exam results after each exam
- Tabulate and communicate results to faculty
- Review and revise questions as needed
- Review and revise course topic coverage as needed based on exam results

What are still currently discussing how to handle the other two required courses since a student may or may not have taken those course by the time they take auditing.

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11. With what metrics will you assess progress toward accomplishing this unit goal on an annual basis?

See above. We would hope that students retain at least 70% of their base knowledge at the time of graduation.

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### TASK FORCE COMMENTS AND/OR QUESTIONS:

12. Are you able to accomplish this unit goal with your current monetary and staffing resources?

Yes

13. If you answered “Yes” to Question #12 and you have the current resources needed to accomplish this goal, how will you use your resources?

Finding time to complete.

14. If you are reallocating your current resources to accomplish this goal, please explain what specific resources will be reallocated.

Time spent on research and service.

15. If you answered “No” or “Partial” to Question #12, what are you able to accomplish without additional resources?

Click here to enter text.
16. If you answered “No” or “Partial” to Question #12, what additional resources do you need to fully accomplish this unit goal? Provide specific dollar amounts.

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     Benefited  Select Yes/No

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     Non Recurring  Select Yes/No  $$: Click here to enter amount.

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   - Equipment — Recurring  
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   Other: Describe:  Click here to enter text.

   - Other — Recurring  
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17. If you were to receive the additional resources outlined in question #16, how will they be used?

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**TASK FORCE COMMENTS AND/OR QUESTIONS:**

18. **What challenges or constraints, other than financial (i.e. federal or state mandates, accreditations, university policy), might affect your progress toward accomplishing this unit goal?**

None that we know of at this time. Perhaps getting students to take exit exam seriously which we will address with some standard practices related to that issue.

19. **What is your timeline for accomplishing this goal?**

3-5 years

Dates: We would expect to complete an assessment loop at least once a year with the hope that it becomes a regular part of our culture within five years.
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**TASK FORCE COMMENTS AND/OR QUESTIONS:**


Goal 5

1. Enter a unit goal:

   Give graduating finance majors an exit exam that covers basic topics from all required courses.

2. Status of goal:

   ☐ Completed    ☐ Eliminated    ☐ Modified    ☒ In Process    ☐ New

3. If goal has been completed, what was the impact on your unit and Plan 2020?

   Click here to enter text.

   **If this goal was completed, skip to the next goal.**

4. If eliminated or modified, state reason:

   ☐ No funding for supplies and expenses    ☐ Priorities shifted
   ☐ No funding for salary & wages    ☐ Loss of staffing
   ☐ No funding for equipment / maintenance of equipment
   ☐ Other: If ‘Other’, click here to explain.

   **If this goal was eliminated, skip to the next goal.**

5. Type of goal:

   ☐ Create/Develop    ☐ Eliminate/Discontinue    ☒ Improve/Enhance
   ☐ Increase Efficiency    ☐ Maintain    ☐ Stretch
   ☐ Other: If ‘Other’, click here to explain.
6. How does your unit goal align with Plan 2020 Goals, Metrics & Outcomes?

Using the Plan 2020 Coding document, identify which three Plan 2020 goals, metrics or outcomes best align with your unit goal. Please make only one selection for each row, using the appropriate drop-down menu based on the Plan 2020 Goal area you want to align with.

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Select up to three Plan 2020 Goals to align with. Choose only one goal for each row.

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7. Is the unit goal a high, medium or low priority?

High

8. Why is this goal important to your unit, the university or both?

Student success is measured by student learning, therefore important to both our department and university.
9. If continuing your goal, what progress have you made or which action steps have been completed?

This was an unexpectedly difficult year for our finance faculty. We have only two tenure track and one continuing lecturer in this area. Just two weeks before the fall semester one of the tenure track faculty announced that he was leaving the university. This resulted in spending the fall searching for his replacement so this goal was moved to the back burner for this year.

We anticipate that a significantly greater amount of progress will be reported next year on this goal.

10. What action(s) does your unit plan to take to support this unit goal?

Identify basic topics covered in required courses (F305, F310, F345, F494 and A325). An equal number of questions will be developed for each course. The exam will be given before graduation.

| RUBRIC |
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**TASK FORCE COMMENTS AND/OR QUESTIONS:**

11. With what metrics will you assess progress toward accomplishing this unit goal on an annual basis?

Undetermined at this time but achievement of a minimum passing rate for most students on the questions once developed.
RUBRIC

Are clearly stated performance measures provided for each goal? (Performance measures are considered 'clearly stated' if a benchmark and quantitative measurement is included.)

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TASK FORCE COMMENTS AND/OR QUESTIONS:

12. Are you able to accomplish this unit goal with your current monetary and staffing resources?

Yes

13. If you answered “Yes” to Question #12 and you have the current resources needed to accomplish this goal, how will you use your resources?

Time is the greatest issue

14. If you are reallocating your current resources to accomplish this goal, please explain what specific resources will be reallocated.

Sacrificing time of research and other service activities

15. If you answered “No” or “Partial” to Question #12, what are you able to accomplish without additional resources?

Click here to enter text.

16. If you answered “No” or “Partial” to Question #12, what additional resources do you need to fully accomplish this unit goal? Provide specific dollar amounts.

CUL - # of positions needed  
Benefited  
Select Yes/No
S & W — Recurring Select Yes/No $$: Click here to enter amount.
Non Recurring Select Yes/No $$: Click here to enter amount.

S & E — Recurring Select Yes/No $$: Click here to enter amount.
Non Recurring Select Yes/No $$: Click here to enter amount.

Equipment — Recurring Select Yes/No $$: Click here to enter amount.
Non Recurring Select Yes/No $$: Click here to enter amount.

Other: Describe: Click here to enter text.

Other — Recurring Select Yes/No $$: Click here to enter amount.
Non Recurring Select Yes/No $$: Click here to enter amount.

17. If you were to receive the additional resources outlined in question #16, how will they be used?

Click here to enter text.

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<td><strong>Are clearly stated budget plans included for each goal?</strong> (A budget plan is considered ‘clearly stated’ if it includes an amount and the funding source.)</td>
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18. What challenges or constraints, other than financial (i.e. federal or state mandates, accreditations, university policy), might affect your progress toward accomplishing this unit goal?

Having students take exit exams seriously is always a concern. We plan to use typical techniques to get them to put their best foot forward.
### RUBRIC

| Are clearly stated challenges identified for each goal? (A challenge is 'clearly stated' if it is explained in detail along with a contingency plan to overcome the challenge). May not pertain to each goal. | Challenges are not included in the unit’s report. | Challenges are listed but they are not clearly stated. | Clearly stated challenges are included for this goal. |

### TASK FORCE COMMENTS AND/OR QUESTIONS:

**19.** What is your timeline for accomplishing this goal?

3-5 years

Dates: We would expect to complete an assessment loop at least once a year with the hope that it becomes a regular part of our culture within five years.
Goal 6

1. Enter a unit goal:

   Strive to increase the number of accounting student completing either a service learning or internship opportunity by 25% by 2020.

2. Status of goal:

   ☒ Completed  ☐ Eliminated  ☐ Modified  ☐ In Process  ☐ New

3. If goal has been completed, what was the impact on your unit and Plan 2020?

   Increased internship/co-op positions by 62% percent over the last year (26 co-ops in 14-15 and 42 in 15-16). Given the current and building demand for accounting graduates we expect this upward trend to continue over the next several years. Our biggest issue is in having enough students to fill the available positions. This accomplishment supports the Increase Student Engagement Plan 2020 Goal.

   **If this goal was completed, skip to the next goal.**

4. If eliminated or modified, state reason:

   □ No funding for supplies and expenses  □ Priorities shifted
   □ No funding for salary & wages  □ Loss of staffing
   □ No funding for equipment / maintenance of equipment
   □ Other:  If ‘Other’, click here to explain.

   **If this goal was eliminated, skip to the next goal.**
5. Type of goal:

☐ Create/Develop  ☐ Eliminate/Discontinue  ☐ Improve/Enhance
☐ Increase Efficiency  ☐ Maintain  ☐ Stretch
☐ Other: If ‘Other’, click here to explain.

6. How does your unit goal align with Plan 2020 Goals, Metrics & Outcomes?

Using the Plan 2020 Coding document, identify which three Plan 2020 goals, metrics or outcomes best align with your unit goal. Please make only one selection for each row, using the appropriate drop-down menu based on the Plan 2020 Goal area you want to align with.

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Note: In the first year, each unit that was directly responsible for student learning (whether the unit was academic or academic support) included at least ONE unit goal (among its other goals) that aligned with EITHER Goal I.A.1 or I.A.2. For this year, each unit directly responsible for students (whether the unit is academic or academic support) should include at least ONE unit goal (among its other goals) that aligns with Metric I.M.1 and associated outcomes, focused on improving retention and graduation rates.

Select up to three Plan 2020 Goals to align with. Choose only one goal for each row.

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7. Is the unit goal a high, medium or low priority?
   Click here to choose.

8. Why is this goal important to your unit, the university or both?
   Click here to enter text.

9. If continuing your goal, what progress have you made or which action steps have been completed?
   Click here to enter text.

10. What action(s) does your unit plan to take to support this unit goal?
    Click here to enter text.

11. With what metrics will you assess progress toward accomplishing this unit goal on an annual basis?
    Click here to enter text.
**RUBRIC**

| Are clearly stated performance measures provided for each goal? (Performance measures are considered 'clearly stated' if a benchmark and quantitative measurement is included.) | The unit provided performance measures but they are not clearly stated. | Some of the stated performance measures are clearly stated. | All performance goals are clearly stated. |

**TASK FORCE COMMENTS AND/OR QUESTIONS:**

12. Are you able to accomplish this unit goal with your current monetary and staffing resources?

   Click here to choose.

13. If you answered “Yes” to Question #12 and you have the current resources needed to accomplish this goal, how will you use your resources?

   Click here to enter text.

14. If you are reallocating your current resources to accomplish this goal, please explain what specific resources will be reallocated.

   Click here to enter text.

15. If you answered “No” or “Partial” to Question #12, what are you able to accomplish without additional resources?

   Click here to enter text.

16. If you answered “No” or “Partial” to Question #12, what additional resources do you need to fully accomplish this unit goal? Provide specific dollar amounts.

   **CUL - # of positions needed**  
   Click here to enter text.

   **Benefited**  
   Select Yes/No
S & W — Recurring  Select Yes/No  $$: Click here to enter amount.
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Non Recurring  Select Yes/No  $$: Click here to enter amount.

Other: Describe:  Click here to enter text.

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17. If you were to receive the additional resources outlined in question #16, how will they be used?

Click here to enter text.

| RUBRIC |
|-----------------|-----------------|-----------------|
| **Are clearly stated budget plans included for each goal?** (A budget plan is considered ‘clearly stated’ if it includes an amount and the funding source.) | No budget information is provided. | Budget plan is included but is not clearly stated. | Goal has a clearly stated budget plan. |

**TASK FORCE COMMENTS AND/OR QUESTIONS:**

18. What challenges or constraints, other than financial (i.e. federal or state mandates, accreditations, university policy), might affect your progress toward accomplishing this unit goal?

Click here to enter text.
### RUBRIC

| Are clearly stated challenges identified for each goal? (A challenge is ‘clearly stated’ if it is explained in detail along with a contingency plan to overcome the challenge). May not pertain to each goal. | Challenges are not included in the unit’s report. | Challenges are listed but they are not clearly stated. | Clearly stated challenges are included for this goal. |

### TASK FORCE COMMENTS AND/OR QUESTIONS:

19. What is your timeline for accomplishing this goal?

   Click here to choose.

   Dates:   Click here to enter text.

### RUBRIC

| Are time frames included for each performance measure (metric)? | No time frames are included with the performance measures. | Some of the performance measures include time frames. | All performance measures include time frames. |

### TASK FORCE COMMENTS AND/OR QUESTIONS:
Goal 7

1. Enter a unit goal:

   Create Honors-option policy with standards that will apply to all occasions when an H-option is granted for any department course.

2. Status of goal:

   □ Completed    □ Eliminated    □ Modified    □ In Process    □ New

3. If goal has been completed, what was the impact on your unit and Plan 2020?

   We are actually not quite complete but needed to eliminate one more goal to reach the five maximum. This policy is being prepared for faculty action and approval at our annual department spring retreat in April so; therefore, will be completed in about a month.

   Impact is that we will now have clear guidance on offering our students a meaningful h-option experience in our accounting and finance courses. Relates to the Increase Student Engagement of the Plan 2020 goals.

   **If this goal was completed, skip to the next goal.**

4. If eliminated or modified, state reason:

   □ No funding for supplies and expenses    □ Priorities shifted
   □ No funding for salary & wages    □ Loss of staffing
   □ No funding for equipment / maintenance of equipment
   □ Other:  If ‘Other’, click here to explain.

   **If this goal was eliminated, skip to the next goal.**
5. Type of goal:

☐ Create/Develop  ☐ Eliminate/Discontinue  ☐ Improve/Enhance
☐ Increase Efficiency  ☐ Maintain  ☐ Stretch
☐ Other:  If ‘Other’, click here to explain.

6. How does your unit goal align with Plan 2020 Goals, Metrics & Outcomes?

Using the Plan 2020 Coding document, identify which three Plan 2020 goals, metrics or outcomes best align with your unit goal. Please make only one selection for each row, using the appropriate drop-down menu based on the Plan 2020 Goal area you want to align with.

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Note: In the first year, each unit that was directly responsible for student learning (whether the unit was academic or academic support) included at least ONE unit goal (among its other goals) that aligned with EITHER Goal I.A.1 or I.A.2. For this year, each unit directly responsible for students (whether the unit is academic or academic support) should include at least ONE unit goal (among its other goals) that aligns with Metric 1.M.1 and associated outcomes, focused on improving retention and graduation rates.

Select up to three Plan 2020 Goals to align with. Choose only one goal for each row.

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7. Is the unit goal a high, medium or low priority?
   Click here to choose.

8. Why is this goal important to your unit, the university or both?
   Click here to enter text.

9. If continuing your goal, what progress have you made or which action steps have been completed?
   Click here to enter text.

10. What action(s) does your unit plan to take to support this unit goal?
    Click here to enter text.

| RUBRIC |
|---------------------------------|---------------------------------|---------------------------------|---------------------------------|
| Do the unit goals align with the University's goals? | Goal does not align with the University's goals. | The goal is somewhat aligned with the University's goals. | The goal is clearly aligned with the University's goals. |

11. With what metrics will you assess progress toward accomplishing this unit goal on an annual basis?
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**TASK FORCE COMMENTS AND/OR QUESTIONS:**

12. Are you able to accomplish this unit goal with your current monetary and staffing resources?

   Click here to choose.

13. If you answered “Yes” to Question #12 and you have the current resources needed to accomplish this goal, how will you use your resources?

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14. If you are reallocating your current resources to accomplish this goal, please explain what specific resources will be reallocated.

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15. If you answered “No” or “Partial” to Question #12, what are you able to accomplish without additional resources?

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16. If you answered “No” or “Partial” to Question #12, what additional resources do you need to fully accomplish this unit goal? Provide specific dollar amounts.

   CUL - # of positions needed  
   Benefited  
   Select Yes/No

   Click here to enter text.
S & W — Recurring  Select Yes/No  $$: Click here to enter amount.
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Equipment — Recurring  Select Yes/No  $$: Click here to enter amount.
Non Recurring  Select Yes/No  $$: Click here to enter amount.

Other: Describe:  Click here to enter text.

Other — Recurring  Select Yes/No  $$: Click here to enter amount.
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17. If you were to receive the additional resources outlined in question #16, how will they be used?

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18. What challenges or constraints, other than financial (i.e. federal or state mandates, accreditations, university policy), might affect your progress toward accomplishing this unit goal?

Click here to enter text.
### RUBRIC

| Are clearly stated challenges identified for each goal? (A challenge is ‘clearly stated’ if it is explained in detail along with a contingency plan to overcome the challenge). May not pertain to each goal. | Challenges are not included in the unit’s report. | Challenges are listed but they are not clearly stated. | Clearly stated challenges are included for this goal. |

### TASK FORCE COMMENTS AND/OR QUESTIONS:

19. What is your timeline for accomplishing this goal?

   Click here to choose.

   Dates:   Click here to enter text.

### RUBRIC

| Are time frames included for each performance measure (metric)? | No time frames are included with the performance measures. | Some of the performance measures include time frames. | All performance measures include time frames. |

### TASK FORCE COMMENTS AND/OR QUESTIONS:
Goal 8

1. Enter a unit goal:
   
   Involve professional community in curriculum decisions and interactions with students.

2. Status of goal:
   
   □ Completed   □ Eliminated   □ Modified   ☒ In Process   □ New

3. If goal has been completed, what was the impact on your unit and Plan 2020?
   
   Click here to enter text.

   If this goal was completed, skip to the next goal.

4. If eliminated or modified, state reason:
   
   □ No funding for supplies and expenses   □ Priorities shifted
   □ No funding for salary & wages   □ Loss of staffing
   □ No funding for equipment / maintenance of equipment
   □ Other: If ‘Other’, click here to explain.

   If this goal was eliminated, skip to the next goal.

5. Type of goal:
   
   □ Create/Develop   □ Eliminate/Discontinue   □ Improve/Enhance
   □ Increase Efficiency   ☒ Maintain   □ Stretch
   □ Other: If ‘Other’, click here to explain.
6. How does your unit goal align with Plan 2020 Goals, Metrics & Outcomes?

Using the Plan 2020 Coding document, identify which three Plan 2020 goals, metrics or outcomes best align with your unit goal. Please make only one selection for each row, using the appropriate drop-down menu based on the Plan 2020 Goal area you want to align with.

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Note: In the first year, each unit that was directly responsible for student learning (whether the unit was academic or academic support) included at least ONE unit goal (among its other goals) that aligned with EITHER Goal I.A.1 or I.A.2. For this year, each unit directly responsible for students (whether the unit is academic or academic support) should include at least ONE unit goal (among its other goals) that aligns with Metric 1.M.1 and associated outcomes, focused on improving retention and graduation rates.

Select up to three Plan 2020 Goals to align with. Choose only one goal for each row.

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7. Is the unit goal a high, medium or low priority?

Medium

8. Why is this goal important to your unit, the university or both?
Placement into field related job opportunities is of upmost importance to any professional program, therefore maintaining relationships with external constituents is very important to understanding the needs of the employers as well as providing our students opportunities to meet with them. We also find this effort sometimes leads to new co-op opportunities.

9. If continuing your goal, what progress have you made or which action steps have been completed?

- 40 to 50 professionals come on campus annually to meet and speak with our students in the classroom and club meetings.
- Informal meetings with alumni/employers off campus remains steady at 8-10 meeting per year with 20 to 30 persons involved.
- Hosted Association of Certified Fraud Examiners meeting on campus with about 10 attendees.
- Scheduled to host an Institute of Internal Auditors meeting next spring.
- Over 30 of our students attended an Institute of Internal Auditors off-campus meeting.

10. What action(s) does your unit plan to take to support this unit goal?

BASIC ACTIONS
- Develop plan for annual meetings with community members to review curriculum
- Choose members of the community to invite
- Choose date to host meeting

DEVELOPMENT
- Email identified community members to determine interest in participation and define items to discuss regarding the curriculum
- Reserve facilities for hosting meeting
- Send notice and invitations to identified members
- Provide faculty with community needs
- Discuss at faculty retreat and implement agreed upon curriculum changes recommended

EVALUATION:
- Assess level of participation every three years
- Assess feasibility of the items raised by community partners
11. With what metrics will you assess progress toward accomplishing this unit goal on an annual basis?

Number of invited community members actively attending meetings. Since our goal is to maintain we want to stay at the levels listed in progress.

12. Are you able to accomplish this unit goal with your current monetary and staffing resources?

Yes

13. If you answered “Yes” to Question #12 and you have the current resources needed to accomplish this goal, how will you use your resources?

Been an ongoing goal for years, no changes to resources required.

14. If you are reallocating your current resources to accomplish this goal, please explain what specific resources will be reallocated.

Click here to enter text.
15. If you answered “No” or “Partial” to Question #12, what are you able to accomplish without additional resources?

Click here to enter text.

16. If you answered “No” or “Partial” to Question #12, what additional resources do you need to fully accomplish this unit goal? Provide specific dollar amounts.

CUL - # of positions needed  Click here to enter text.
Benefited  Select Yes/No

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Other: Describe:  Click here to enter text.

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Non Recurring  Select Yes/No  $$: Click here to enter amount.

17. If you were to receive the additional resources outlined in question #16, how will they be used?

Click here to enter text.


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### TASK FORCE COMMENTS AND/OR QUESTIONS:

18. What challenges or constraints, other than financial (i.e. federal or state mandates, accreditations, university policy), might affect your progress toward accomplishing this unit goal?

None that we are aware of at this time.

### RUBRIC

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### TASK FORCE COMMENTS AND/OR QUESTIONS:

19. What is your timeline for accomplishing this goal?

5+ years

Dates: We truly believe this is vital to our student success and do not see that changing anytime in the near future.
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**TASK FORCE COMMENTS AND/OR QUESTIONS:**
Goal 9

1. Enter a unit goal:

Maintain and improve External and Alumni Relations by hosting various annual events.

2. Status of goal:

☐ Completed  □ Eliminated  □ Modified  ☒ In Process  ☐ New

3. If goal has been completed, what was the impact on your unit and Plan 2020?

Click here to enter text.

If this goal was completed, skip to the next goal.

4. If eliminated or modified, state reason:

☐ No funding for supplies and expenses    ☐ Priorities shifted
☐ No funding for salary & wages           ☐ Loss of staffing
☐ No funding for equipment / maintenance of equipment
☐ Other:  If ‘Other’, click here to explain.

If this goal was eliminated, skip to the next goal.

5. Type of goal:

☐ Create/Develop     ☐ Eliminate/Discontinue  ☒ Improve/Enhance
☐ Increase Efficiency ☐ Maintain              ☐ Stretch
☐ Other:  If ‘Other’, click here to explain.
6. How does your unit goal align with Plan 2020 Goals, Metrics & Outcomes?

Using the Plan 2020 Coding document, identify which three Plan 2020 goals, metrics or outcomes best align with your unit goal. Please make only one selection for each row, using the appropriate drop-down menu based on the Plan 2020 Goal area you want to align with.

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Note: In the first year, each unit that was directly responsible for student learning (whether the unit was academic or academic support) included at least ONE unit goal (among its other goals) that aligned with EITHER Goal I.A.1 or I.A.2. For this year, each unit directly responsible for students (whether the unit is academic or academic support) should include at least ONE unit goal (among its other goals) that aligns with Metric 1.M.1 and associated outcomes, focused on improving retention and graduation rates.

Select up to three Plan 2020 Goals to align with. Choose only one goal for each row.

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<tbody>
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<td>I.E.3</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
</tr>
<tr>
<td>2nd Plan 2020 Goal</td>
<td>I.C.4</td>
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</tr>
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<td>3rd Plan 2020 Goal</td>
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</tr>
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</table>

7. Is the unit goal a high, medium or low priority?

Low

8. Why is this goal important to your unit, the university or both?

Ideally would result in increased alumni donations or commitment (such as internships) to the department and university.
9. If continuing your goal, what progress have you made or which action steps have been completed?

As a low priority goal we talk about this often but have yet to make any progress.

10. What action(s) does your unit plan to take to support this unit goal?

Along with assistance from the Department of Continuing Studies, the department seeks to coordinate the following:

- Meeting of the Institute of Internal Auditors
- Meeting of the Financial Executives Institute
- Alumni Event for graduates of the Department
- Meetings with other professional organizations

Solicit funds through an Annual Appeal

<table>
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<td><strong>Do the unit goals align with the University’s goals?</strong></td>
</tr>
<tr>
<td>Goal does not align with the University's goals.</td>
</tr>
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</table>

**TASK FORCE COMMENTS AND/OR QUESTIONS:**

11. With what metrics will you assess progress toward accomplishing this unit goal on an annual basis?

- # of Events Held (at least two per year)
- Participation Rate (at least 25 to 30 participants per event)
- Dollars Collected or Pledged (set a base of $5,000 and increase by 10% per year until we hit a stable plateau.)
**RUBRIC**

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<th>Are clearly stated performance measures provided for each goal? (Performance measures are considered 'clearly stated' if a benchmark and quantitative measurement is included.)</th>
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**TASK FORCE COMMENTS AND/OR QUESTIONS:**

**12.** Are you able to accomplish this unit goal with your current monetary and staffing resources?

No

**13.** If you answered “Yes” to Question #12 and you have the current resources needed to accomplish this goal, how will you use your resources?

Click here to enter text.

**14.** If you are reallocating your current resources to accomplish this goal, please explain what specific resources will be reallocated.

Click here to enter text.

**15.** If you answered “No” or “Partial” to Question #12, what are you able to accomplish without additional resources?

Finding time is the biggest issue so we typically say ---- maybe next year.

**16.** If you answered “No” or “Partial” to Question #12, what additional resources do you need to fully accomplish this unit goal? Provide specific dollar amounts.

CUL - # of positions needed  
Benefited  

Click here to enter text.  
Select Yes/No
S & W — Recurring  Select Yes/No  $\$: Click here to enter amount.
Non Recurring  Select Yes/No  $\$: Click here to enter amount.

S & E — Recurring  Select Yes/No  $\$: Click here to enter amount.
Non Recurring  Select Yes/No  $\$: Click here to enter amount.

Equipment — Recurring  Select Yes/No  $\$: Click here to enter amount.
Non Recurring  Select Yes/No  $\$: Click here to enter amount.

Other: Describe:  Click here to enter text.

Other — Recurring  Select Yes/No  $\$: Click here to enter amount.
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17. If you were to receive the additional resources outlined in question #16, how will they be used?

Click here to enter text.

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**TASK FORCE COMMENTS AND/OR QUESTIONS:**

18. What challenges or constraints, other than financial (i.e. federal or state mandates, accreditations, university policy), might affect your progress toward accomplishing this unit goal?

As mentioned above time is the greatest issue and we have yet to find a solution to that problem.
Are clearly stated challenges identified for each goal? (A challenge is 'clearly stated' if it is explained in detail along with a contingency plan to overcome the challenge). May not pertain to each goal.

Challenges are not included in the unit's report. | Challenges are listed but they are not clearly stated. | Clearly stated challenges are included for this goal.

RUBRIC

19. What is your timeline for accomplishing this goal?

3-5 years

Dates: We have done one or two things related to this goal – see previous goal accomplishment but have not yet adequately tied that into fundraising.

Are time frames included for each performance measure (metric)?

No time frames are included with the performance measures. | Some of the performance measures include time frames. | All performance measures include time frames.

RUBRIC

TASK FORCE COMMENTS AND/OR QUESTIONS:
New Goals for 2015-2016 - #1

1. Enter a unit goal:
   
   Click here to enter text.

2. Status of goal:
   
   □ Completed       □ Eliminated       □ Modified       □ In Process       □ New

3. If goal has been completed, what was the impact on your unit and Plan 2020?
   
   Click here to enter text.

   **If this goal was completed, skip to the next goal.**

4. If eliminated or modified, state reason:
   
   □ No funding for supplies and expenses       □ Priorities shifted
   □ No funding for salary & wages       □ Loss of staffing
   □ No funding for equipment / maintenance of equipment
   □ Other:  If ‘Other’, click here to explain.

   **If this goal was eliminated, skip to the next goal.**

5. Type of goal:
   
   □ Create/Develop       □ Eliminate/Discontinue       □ Improve/Enhance
   □ Increase Efficiency       □ Maintain       □ Stretch
   □ Other:  If ‘Other’, click here to explain.
6. How does your unit goal align with Plan 2020 Goals, Metrics & Outcomes?

Using the Plan 2020 Coding document, identify which three Plan 2020 goals, metrics or outcomes best align with your unit goal. Please make only one selection for each row, using the appropriate drop-down menu based on the Plan 2020 Goal area you want to align with.

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Note: In the first year, each unit that was directly responsible for student learning (whether the unit was academic or academic support) included at least ONE unit goal (among its other goals) that aligned with EITHER Goal I.A.1 or I.A.2. For this year, each unit directly responsible for students (whether the unit is academic or academic support) should include at least ONE unit goal (among its other goals) that aligns with Metric 1.M.1 and associated outcomes, focused on improving retention and graduation rates.

Select up to three Plan 2020 Goals to align with. Choose only one goal for each row.

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7. Is the unit goal a high, medium or low priority?

Click here to choose.

8. Why is this goal important to your unit, the university or both?

Click here to enter text.
9. If continuing your goal, what progress have you made or which action steps have been completed?

   Click here to enter text.

10. What action(s) does your unit plan to take to support this unit goal?

   Click here to enter text.

| RUBRIC |
|-----------------|-----------------|-----------------|-----------------|
| **Do the unit goals align with the University’s goals?** | Goal does not align with the University's goals. | The goal is somewhat aligned with the University's goals. | The goal is clearly aligned with the University’s goals. |

**TASK FORCE COMMENTS AND/OR QUESTIONS:**

11. With what metrics will you assess progress toward accomplishing this unit goal on an annual basis?

   Click here to enter text.

| RUBRIC |
|-----------------|-----------------|-----------------|-----------------|
| **Are clearly stated performance measures provided for each goal?** (Performance measures are considered 'clearly stated' if a benchmark and quantitative measurement is included). | The unit provided performance measures but they are not clearly stated. | Some of the stated performance measures are clearly stated. | All performance goals are clearly stated. |

**TASK FORCE COMMENTS AND/OR QUESTIONS:**

12. Are you able to accomplish this unit goal with your current monetary and staffing resources?

   Click here to choose.
13. If you answered “Yes” to Question #12 and you have the current resources needed to accomplish this goal, how will you use your resources?

   Click here to enter text.

14. If you are reallocating your current resources to accomplish this goal, please explain what specific resources will be reallocated.

   Click here to enter text.

15. If you answered “No” or “Partial” to Question #12, what are you able to accomplish without additional resources?

   Click here to enter text.

16. If you answered “No” or “Partial” to Question #12, what additional resources do you need to fully accomplish this unit goal? Provide specific dollar amounts.

   CUL - # of positions needed  Click here to enter text.

   Benefited  Select Yes/No

   S & W — Recurring  Select Yes/No  $$: Click here to enter amount.

   Non Recurring  Select Yes/No  $$: Click here to enter amount.

   S & E — Recurring  Select Yes/No  $$: Click here to enter amount.

   Non Recurring  Select Yes/No  $$: Click here to enter amount.

   Equipment — Recurring  Select Yes/No  $$: Click here to enter amount.

   Non Recurring  Select Yes/No  $$: Click here to enter amount.

   Other: Describe:  Click here to enter text.
Other — Recurring  Select Yes/No  $$: Click here to enter amount.
Non Recurring  Select Yes/No  $$: Click here to enter amount.

17. If you were to receive the additional resources outlined in question #16, how will they be used?

Click here to enter text.

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18. What challenges or constraints, other than financial (i.e. federal or state mandates, accreditations, university policy), might affect your progress toward accomplishing this unit goal?

Click here to enter text.

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TASK FORCE COMMENTS AND/OR QUESTIONS:
19. What is your timeline for accomplishing this goal?

Click here to choose.

Dates:  Click here to enter text.

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<th>Are time frames included for each performance measure (metric)?</th>
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**RUBRIC**

**TASK FORCE COMMENTS AND/OR QUESTIONS:**
New Goals for 2015-2016 - #2

1. Enter a unit goal:
   Click here to enter text.

2. Status of goal:
   □ Completed   □ Eliminated   □ Modified   □ In Process   □ New

3. If goal has been completed, what was the impact on your unit and Plan 2020?
   Click here to enter text.
   **If this goal was completed, skip to the next goal.**

4. If eliminated or modified, state reason:
   □ No funding for supplies and expenses   □ Priorities shifted
   □ No funding for salary & wages   □ Loss of staffing
   □ No funding for equipment / maintenance of equipment
   □ Other: If ‘Other’, click here to explain.
   **If this goal was eliminated, skip to the next goal.**

5. Type of goal:
   □ Create/Develop   □ Eliminate/Discontinue   □ Improve/Enhance
   □ Increase Efficiency   □ Maintain   □ Stretch
   □ Other: If ‘Other’, click here to explain.
6. How does your unit goal align with Plan 2020 Goals, Metrics & Outcomes?

Using the Plan 2020 Coding document, identify which three Plan 2020 goals, metrics or outcomes best align with your unit goal. **Please make only one selection for each row, using the appropriate drop-down menu based on the Plan 2020 Goal area you want to align with.**

Plan 2020 is structured around four goal areas: I – Student Success, II – Creation, Integration and Application of Knowledge, III – Regional Activities, and IV – Creating a Stronger University. You may find that your unit goal aligns to multiple Plan 2020 goals and at different levels, and that is fine. Please choose goals at the lowest level only. (For example, if you have a unit goal focused on building a relationship with a regional partner, you only need to choose I.E.3 and not I.E. or I. Conversely, if you have a unit goal that aligns with student success but doesn’t really have an applicable lower-level goal, choose I – Student Success.)

*Note: In the first year, each unit that was directly responsible for student learning (whether the unit was academic or academic support) included at least ONE unit goal (among its other goals) that aligned with EITHER Goal I.A.1 or I.A.2. For this year, each unit directly responsible for students (whether the unit is academic or academic support) should include at least ONE unit goal (among its other goals) that aligns with Metric 1.M.1 and associated outcomes, focused on improving retention and graduation rates.*

Select up to three Plan 2020 Goals to align with. **Choose only one goal for each row.**

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7. Is the unit goal a high, medium or low priority?

Click here to choose.

8. Why is this goal important to your unit, the university or both?

Click here to enter text.
9. If continuing your goal, what progress have you made or which action steps have been completed?

Click here to enter text.

10. What action(s) does your unit plan to take to support this unit goal?

Click here to enter text.

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**TASK FORCE COMMENTS AND/OR QUESTIONS:**

11. With what metrics will you assess progress toward accomplishing this unit goal on an annual basis?

Click here to enter text.

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**TASK FORCE COMMENTS AND/OR QUESTIONS:**

12. Are you able to accomplish this unit goal with your current monetary and staffing resources?

Click here to choose.
13. If you answered “Yes” to Question #12 and you have the current resources needed to accomplish this goal, how will you use your resources?

Click here to enter text.

14. If you are reallocating your current resources to accomplish this goal, please explain what specific resources will be reallocated.

Click here to enter text.

15. If you answered “No” or “Partial” to Question #12, what are you able to accomplish without additional resources?

Click here to enter text.

16. If you answered “No” or “Partial” to Question #12, what additional resources do you need to fully accomplish this unit goal? Provide specific dollar amounts.

CUL - # of positions needed
Benefited

S & W — Recurring
Non Recurring

S & E — Recurring
Non Recurring

Equipment — Recurring
Non Recurring

Other: Describe:

Click here to enter text.
Other — Recurring  
Select Yes/No  
$$: Click here to enter amount.

Non Recurring  
Select Yes/No  
$$: Click here to enter amount.

17. If you were to receive the additional resources outlined in question #16, how will they be used?

Click here to enter text.

| RUBRIC |
|------------------|------------------|-------------------|
| **Are clearly stated budget plans included for each goal?** *(A budget plan is considered ‘clearly stated’ if it includes an amount and the funding source.)* | No budget information is provided. | Budget plan is included but is not clearly stated. | Goal has a clearly stated budget plan. |

**TASK FORCE COMMENTS AND/OR QUESTIONS:**

18. What challenges or constraints, other than financial (i.e. federal or state mandates, accreditations, university policy), might affect your progress toward accomplishing this unit goal?

Click here to enter text.

| RUBRIC |
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| **Are clearly stated challenges identified for each goal?** *(A challenge is ‘clearly stated’ if it is explained in detail along with a contingency plan to overcome the challenge). May not pertain to each goal.* | Challenges are not included in the unit's report. | Challenges are listed but they are not clearly stated. | Clearly stated challenges are included for this goal. |

**TASK FORCE COMMENTS AND/OR QUESTIONS:**
19. What is your timeline for accomplishing this goal?

Click here to choose.

Dates: Click here to enter text.

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**TASK FORCE COMMENTS AND/OR QUESTIONS:**
New Goals for 2015-2016 - #3

1. Enter a unit goal:
   Click here to enter text.

2. Status of goal:
   - [ ] Completed
   - [ ] Eliminated
   - [ ] Modified
   - [ ] In Process
   - [ ] New

3. If goal has been completed, what was the impact on your unit and Plan 2020?
   Click here to enter text.
   **If this goal was completed, skip to the next goal.**

4. If eliminated or modified, state reason:
   - [ ] No funding for supplies and expenses
   - [ ] Priorities shifted
   - [ ] No funding for salary & wages
   - [ ] Loss of staffing
   - [ ] No funding for equipment / maintenance of equipment
   - [ ] Other: If ‘Other’, click here to explain.
   **If this goal was eliminated, skip to the next goal.**

5. Type of goal:
   - [ ] Create/Develop
   - [ ] Eliminate/Discontinue
   - [ ] Improve/Enhance
   - [ ] Increase Efficiency
   - [ ] Maintain
   - [ ] Stretch
   - [ ] Other: If ‘Other’, click here to explain.
6. How does your unit goal align with Plan 2020 Goals, Metrics & Outcomes?

Using the Plan 2020 Coding document, identify which three Plan 2020 goals, metrics or outcomes best align with your unit goal. Please make only one selection for each row, using the appropriate drop-down menu based on the Plan 2020 Goal area you want to align with.

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Select up to three Plan 2020 Goals to align with. Choose only one goal for each row.

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7. Is the unit goal a high, medium or low priority?

Click here to choose.

8. Why is this goal important to your unit, the university or both?

Click here to enter text.
9. If continuing your goal, what progress have you made or which action steps have been completed?

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10. What action(s) does your unit plan to take to support this unit goal?

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**TASK FORCE COMMENTS AND/OR QUESTIONS:**

11. With what metrics will you assess progress toward accomplishing this unit goal on an annual basis?

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**TASK FORCE COMMENTS AND/OR QUESTIONS:**

12. Are you able to accomplish this unit goal with your current monetary and staffing resources?

Click here to choose.
13. If you answered “Yes” to Question #12 and you have the current resources needed to accomplish this goal, how will you use your resources?

Click here to enter text.

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Click here to enter text.

16. If you answered “No” or “Partial” to Question #12, what additional resources do you need to fully accomplish this unit goal? Provide specific dollar amounts.

   CUL - # of positions needed Click here to enter text.
   Benefited Select Yes/No

   S & W — Recurring Select Yes/No $$: Click here to enter amount.
   Non Recurring Select Yes/No $$: Click here to enter amount.

   S & E — Recurring Select Yes/No $$: Click here to enter amount.
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   Equipment — Recurring Select Yes/No $$: Click here to enter amount.
   Non Recurring Select Yes/No $$: Click here to enter amount.

Other: Describe: Click here to enter text.
17. If you were to receive the additional resources outlined in question #16, how will they be used?

Click here to enter text.

RUBRIC

| Are clearly stated budget plans included for each goal? (A budget plan is considered 'clearly stated' if it includes an amount and the funding source.) | No budget information is provided. | Budget plan is included but is not clearly stated. | Goal has a clearly stated budget plan. |

TASK FORCE COMMENTS AND/OR QUESTIONS:

18. What challenges or constraints, other than financial (i.e. federal or state mandates, accreditations, university policy), might affect your progress toward accomplishing this unit goal?

Click here to enter text.

RUBRIC

| Are clearly stated challenges identified for each goal? (A challenge is 'clearly stated' if it is explained in detail along with a contingency plan to overcome the challenge). May not pertain to each goal. | Challenges are not included in the unit's report. | Challenges are listed but they are not clearly stated. | Clearly stated challenges are included for this goal. |

TASK FORCE COMMENTS AND/OR QUESTIONS:
19. What is your timeline for accomplishing this goal?

   Click here to choose.

   Dates:   Click here to enter text.

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<td>Are time frames included for each performance measure (metric)?</td>
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**TASK FORCE COMMENTS AND/OR QUESTIONS:**
New Goals for 2015-2016 - #4

1. Enter a unit goal:
   
   Click here to enter text.

2. Status of goal:

   ☐ Completed    ☐ Eliminated    ☐ Modified    ☐ In Process    ☐ New

3. If goal has been completed, what was the impact on your unit and Plan 2020?

   Click here to enter text.

   **If this goal was completed, skip to the next goal.**

4. If eliminated or modified, state reason:

   ☐ No funding for supplies and expenses    ☐ Priorities shifted
   ☐ No funding for salary & wages    ☐ Loss of staffing
   ☐ No funding for equipment / maintenance of equipment
   ☐ Other:  If ‘Other’, click here to explain.

   **If this goal was eliminated, skip to the next goal.**

5. Type of goal:

   ☐ Create/Develop    ☐ Eliminate/Discontinue    ☐ Improve/Enhance
   ☐ Increase Efficiency    ☐ Maintain    ☐ Stretch
   ☐ Other:  If ‘Other’, click here to explain.
6. How does your unit goal align with Plan 2020 Goals, Metrics & Outcomes?

Using the Plan 2020 Coding document, identify which three Plan 2020 goals, metrics or outcomes best align with your unit goal. Please make only one selection for each row, using the appropriate drop-down menu based on the Plan 2020 Goal area you want to align with.

Plan 2020 is structured around four goal areas: I – Student Success, II – Creation, Integration and Application of Knowledge, III – Regional Activities, and IV – Creating a Stronger University. You may find that your unit goal aligns to multiple Plan 2020 goals and at different levels, and that is fine. Please choose goals at the lowest level only. (For example, if you have a unit goal focused on building a relationship with a regional partner, you only need to choose I.E.3 and not I.E. or I. Conversely, if you have a unit goal that aligns with student success but doesn’t really have an applicable lower-level goal, choose I – Student Success.)

Note: In the first year, each unit that was directly responsible for student learning (whether the unit was academic or academic support) included at least ONE unit goal (among its other goals) that aligned with EITHER Goal I.A.1 or I.A.2. For this year, each unit directly responsible for students (whether the unit is academic or academic support) should include at least ONE unit goal (among its other goals) that aligns with Metric 1.M.1 and associated outcomes, focused on improving retention and graduation rates.

Select up to three Plan 2020 Goals to align with. Choose only one goal for each row.

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7. Is the unit goal a high, medium or low priority?

Click here to choose.

8. Why is this goal important to your unit, the university or both?

Click here to enter text.
9. If continuing your goal, what progress have you made or which action steps have been completed?

Click here to enter text.

10. What action(s) does your unit plan to take to support this unit goal?

Click here to enter text.

| RUBRIC |
|-----------------|---------------------------------|---------------------------------|---------------------------------|
| Do the unit goals align with the University’s goals? | Goal does not align with the University's goals. | The goal is somewhat aligned with the University's goals. | The goal is clearly aligned with the University’s goals. |

**TASK FORCE COMMENTS AND/OR QUESTIONS:**

11. With what metrics will you assess progress toward accomplishing this unit goal on an annual basis?

Click here to enter text.

| RUBRIC |
|-----------------|---------------------------------|---------------------------------|---------------------------------|
| Are clearly stated performance measures provided for each goal? (Performance measures are considered ‘clearly stated’ if a benchmark and quantitative measurement is included). | The unit provided performance measures but they are not clearly stated. | Some of the stated performance measures are clearly stated. | All performance goals are clearly stated. |

**TASK FORCE COMMENTS AND/OR QUESTIONS:**

12. Are you able to accomplish this unit goal with your current monetary and staffing resources?

Click here to choose.
13. If you answered “Yes” to Question #12 and you have the current resources needed to accomplish this goal, how will you use your resources?

Click here to enter text.

14. If you are reallocating your current resources to accomplish this goal, please explain what specific resources will be reallocated.

Click here to enter text.

15. If you answered “No” or “Partial” to Question #12, what are you able to accomplish without additional resources?

Click here to enter text.

16. If you answered “No” or “Partial” to Question #12, what additional resources do you need to fully accomplish this unit goal? Provide specific dollar amounts.

- CUL - # of positions needed
  - Benefited
    - Select Yes/No

- S & W — Recurring
  - Select Yes/No
  - $$: Click here to enter amount.

- Non Recurring
  - Select Yes/No
  - $$: Click here to enter amount.

- S & E — Recurring
  - Select Yes/No
  - $$: Click here to enter amount.

- Non Recurring
  - Select Yes/No
  - $$: Click here to enter amount.

- Equipment — Recurring
  - Select Yes/No
  - $$: Click here to enter amount.

- Non Recurring
  - Select Yes/No
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Other: Describe: Click here to enter text.
17. If you were to receive the additional resources outlined in question #16, how will they be used?

Click here to enter text.

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**TASK FORCE COMMENTS AND/OR QUESTIONS:**

18. What challenges or constraints, other than financial (i.e. federal or state mandates, accreditations, university policy), might affect your progress toward accomplishing this unit goal?

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**TASK FORCE COMMENTS AND/OR QUESTIONS:**
19. What is your timeline for accomplishing this goal?

Click here to choose.

Dates: Click here to enter text.

| RUBRIC |
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| **Are time frames included for each performance measure (metric)?** | No time frames are included with the performance measures. | Some of the performance measures include time frames. |
| | | All performance measures include time frames. |

**TASK FORCE COMMENTS AND/OR QUESTIONS:**
New Goals for 2015-2016 - #5

1. Enter a unit goal:
   Click here to enter text.

2. Status of goal:
   □ Completed    □ Eliminated    □ Modified    □ In Process    □ New

3. If goal has been completed, what was the impact on your unit and Plan 2020?
   Click here to enter text.
   **If this goal was completed, skip to the next goal.**

4. If eliminated or modified, state reason:
   □ No funding for supplies and expenses    □ Priorities shifted
   □ No funding for salary & wages           □ Loss of staffing
   □ No funding for equipment / maintenance of equipment
   □ Other: If ‘Other’, click here to explain.
   **If this goal was eliminated, skip to the next goal.**

5. Type of goal:
   □ Create/Develop    □ Eliminate/Discontinue    □ Improve/Enhance
   □ Increase Efficiency    □ Maintain    □ Stretch
   □ Other: If ‘Other’, click here to explain.
6. How does your unit goal align with Plan 2020 Goals, Metrics & Outcomes?

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**TASK FORCE COMMENTS AND/OR QUESTIONS:**

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