Part I

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

Alumni Relations helps the university meet its mission by creating an ever-growing population of engaged and enthusiastic alumni who are willing to give back to the institution with their time, talent or treasure.

Our values further the mission by fostering tradition and pride in the institution which leverages sustainable funding opportunities for the future by encouraging and empowering alumni and friends to give. As such, the Alumni Relations department also strives to advocate and honor the institution and build and sustain the university brand as an organization that values its alumni and their successes in our community and around the country.

**RUBRIC**

To what extent was evidence provided to demonstrate how well the unit supports the mission statement of the University?

| To what extent was evidence provided to demonstrate how well the unit supports the mission statement of the University? | The unit did not provide evidence of their support of the mission statement. | The unit provided some indicator of how it supports the mission statement. | The unit specifically explained how it supports the mission statement and provided examples. |

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

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

- 6.5% growth in our total membership sales during a time when many of our peer institutions lost membership. This growth is significant because it directly correlates to the funds available for alumni programming.

- License plate sales are up 17% over last year and we sold more plates in September than any other month on record.
This makes up almost $10,000 per year in scholarship money for students

- The affinity group creation efforts of the IPFW Alumni Relations office were recognized in an article in the CASE Current magazine, a national trade publication for advancement professionals. Specifically, our Blue and White Committee of alumni who work on campus is a breakthrough idea in the alumni relations industry. The Chair of the group, Victoria Sarjeant, is speaking about it at the CASE Conference in Chicago this December.

- The 17th Annual Mastodon Roast on October 1st was the largest one in recorded history with over 500 RSVP’s. This is evidence that our increased engagement and marketing efforts are seeing success and will help increase alumni giving and/or volunteering.

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<td>To what extent did the unit provide evidence that accomplishments</td>
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<td>align with the mission of the University? (Only include accomplishments</td>
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<td>that are not included with goals)</td>
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<td>The unit did not provide evidence that accomplishments align with the</td>
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<td>mission of the University.</td>
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<tr>
<td>The unit provided evidence that accomplishments somewhat align with</td>
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<td>the mission of the University.</td>
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<tr>
<th>TASK FORCE COMMENTS AND/OR QUESTIONS:</th>
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3. What program-specific accreditations or federal & state laws impact what you do?

N/A
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<tr>
<td>To what extent did the unit evaluate the impact of accreditation constraints and/or benefits?</td>
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<tr>
<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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</table>

4. Please provide the performance metrics identified for your unit and the associated data. (Note: Include the time period the data represent.) Upon review, are there any data you wish to comment on or contextualize?

Click here to enter text.

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

Click here to enter text.

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

Debra Boggs and Melissa Eastman
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:
   
   Increase engagement of internal & external audiences

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?
   
   This is an ever present goal of Alumni Relations that has been successful however is never finished or completed.

   **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.

<table>
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<tr>
<th>1(^{st}) Plan 2020 Goal</th>
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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?

Promoting student, alumni and community relationships with each other and the university strengthens the university’s role as an effective and excellent educator of the region and beyond.

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

- Create and/or strengthen campus partnerships to allow for efficient use of resources and increased ability to engage with a wider audience of alumni and students.
  - In-process
- Create networking events with each school/college to target our audience of alumni and students to the industry they are most interested in.
  - This was done with DSB and was very successful, it is being done again this year with plans to grow alumni attendance.
- Work to grow the visibility and function of the alumni office through offering more relevant services to other departments and through strengthened relationships throughout campus.
  - We worked with new departments this year such as Nursing to help hold new alumni events with funding and logistic support from our department.
- Grow value in association membership through increased member benefits and more targeted events.
  - This was done through introducing Random Acts for Members, which are monthly events/giveaways to promote membership and fellowship with members however this was not effective and has been eliminated.
- Restructure the Alumni Association Board to better meet the needs of the new university strategic plan.
  - This was done through adding a social committee and changing the leadership of the board. The seats are now full for the first time in years and the leadership is doing a great job of getting the group on the right track.
- Create affinity groups to grow volunteer engagement and grow our efforts in increasing the diversity of our programming. We plan to build an African American, Latino, and IPFW employee affinity groups this year.
This was very successful this year. The plan was modified due to the needs and wants of our alumni, so right now the main focus is on the employee alumni group and the African American and Latino groups are being tabled for future programming. However, the employee group was so successful that it gained the attention of a national trade publication. The employee group called the Blue and White Committee has been instrumental in providing volunteer services and social opportunities around campus to Alumni Relations and other departments.

- Re-build STAT with a stronger student leadership focus that also works much more closely with our alumni events to increase networking and job prospects for our students.

- After a year of trying to rebuild this program, we have decided that it is a better use of programming dollars to focus our student efforts on senior year programs instead of STAT, so this item is being discontinued.

- Recommend alumni for campus boards and committees to increase volunteer engagement.

- Grow license plate program through increased marketing efforts to keep the university from losing the scholarship funding in 2015.

  This campaign was successful with the sales of over 500 specialty license plates in the 2015 calendar year that ensured the continuation of the program as well as the scholarship money associated with it. Explore the opportunity to change the logo based upon constituency’s input.

- Continue to engage students in alumni events and programming for experiential learning.

  - In process

- Launch iModules to better manage events and attendance information.

  - This is a wider Advancement-level initiative however Alumni Relations is working on using alternative event management sites to improve attendees event experience and better working metrics for staff.

- Revitalize the Think Buy alumni owned business program.

  - Due to staff transitions this program lost some momentum however is viewed as an important connection for students, alumni and the university for potential mentorships, internships, promotion of alumni success and strategic relationships within the community.

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

Click here to enter text.

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| **with the University’s**
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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?

- Event attendance
- License plate sales
- Number of cross campus collaborations and/or events
- Increased Think Buy partnerships

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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?

We will use our resources how they are currently structured. If reallocation is necessary such actions would be with the input and approval of the Alumni Advisory Board.

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

N/A

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.
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?

Currently the Alumni Relations office is not at full staff. This may slow the previously stated goals due to onboarding staff.

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

   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:  

_________________________________________________________________________
Goal 2

1. Enter a unit goal:
   Increase alumni funding and increase efficient use of resources

2. Status of goal:
   ☒ Completed    ☐ Eliminated    ☐ Modified    ☒ In Process    ☐ New
If goal has been completed, what was the impact on your unit and Plan 2020?

- Allocate staff time and department resources based on university priorities.
  - This has been done throughout the year through discontinuing some programming that was either not a good use of resources or took too much staff time to complete with little return or impact on Plan 20/20. An example of this is how we chose to stop focusing staff time on the Students Today Alumni Tomorrow program which was taking significant staff time and financial resources and was not producing a return in alumni volunteerism or membership after graduation.

- Purchase and implement new software programs such as an event planning platform and new e-marketing tool to increase our reach with electronic communication.
  - This has been put on hold at the Advancement level, so it has not been completed yet.

- Increase work-study student program in our department help raise the output of work to accomplish goals & tasks.
  - This has been very successful. We have hired a number of capable and helpful work study students this year that have helped us get more work done on an office level at a cost that would be less than a half-time regular employee. This has freed up Alumni Relations staff to focus more efficiently on bigger projects that help increase alumni engagement.

- Implement a strategy for sustainable external funding from affinity partnerships.
  - This tactic was eliminated after a lengthy process to produce quotes and contracts with various vendors. The reason was that IU and Purdue already have exclusive contacts with affinity vendors, so we are not able to market to our alumni and they are not planning to share their affinity marketing profits with us. This is something we are now unable to pursue at this time.

- Increase partnerships with IU and Purdue for increased efficiencies and use of resources through combined services.
This has been successful, as we have worked with IU and Purdue to help us utilize their resources to help us do our work more efficiently. An example of this was to work with IU to do a membership campaign out of their office but branded for IPFW. That meant that we were able to increase our alumni membership funding without using any IPFW staff time or financial resources.

- Audit current back-office operations to ensure all work being done is necessary and in alignment with our mission and the university’s strategic goals.

  o  This is an on-going process, but one that we have made progress on. Several duties that were assigned to our administrative staff have been discontinued because they took too much staff time and were not meeting the needs of Plan 20/20. An example of this is that we no longer actively look for alumni class notes in area publications. That was a practice that took many man-hours for a small spread in the alumni magazine each year.

- Audit current vendor contracts to ensure that the budget dollars are being spent wisely and only on necessary products and services.

  o  This is something that we did all year this year. Instead of using the same vendors for every event, we quoted pricing to make sure that budgets were being spent in the most efficient way possible. We found some areas where spending could be cut in order to allow our funds to go further in other areas.

**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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<td>IV.B - Efficiency</td>
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</table>
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?
   This was an important goal because we have to know that we are using our limited resources, both man-hours and funding, in the most efficient way possible so that we can do more in areas of alumni engagement and communication to help further the efforts of the Advancement division.

   We are now able to get more work done while using less financial resources and engaging more alumni than ever.

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

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

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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 |
|------------------|------------------|------------------|------------------|
| **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.
Goal 3

1. Enter a unit goal:

   Expand Communication to Alumni

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?

• Resign alumni magazine to appeal to a broader audience and improve its shelf-life.
  - The re-design is completed and will include a larger audience and be more of an IPFW pride piece than a traditional alumni magazine. The re-design has included the former donor profile piece to combine both alumni and donor stories to offer a more integrated message for university engagement targeting a broader audience.

• Recommend alumni to serve on various university boards and committees to allow for broader alumni participation and communication.
  - This has been completed and we make recommendations whenever another department reaches out to us. We have also gotten talented and passionate alumni involved with other areas of campus. Right now Greg Cutchin is teaching Spanish because of connections our office made with him.

• Expand reach of the eNewsletter and social media outlets to increase our engagement through low-cost virtual media.
  - This has been a really successful initiative this year. We started putting low-cost paid ads on Facebook and that has led to greater event attendance and participation in our license plate program. Also, we have doubled our Twitter following over the past year, doubled our new Facebook likes this year over the new likes in 2013/2014 and our e-newsletter open rate is steadily increasing and is now over 30% with over 800 opens per month.

• Grow license plate program through increased marketing initiatives and incentives.
  - Through additional marketing on Facebook, on campus, adding a committee to help, and working with volunteers, the license plate program grew 17% this year over last year and we had record sales two months this year over any other year on record.

• Audit and retool social media sites to appeal to a broader audience and serve our alumni with relevant and timely information.
  - This was completed this year with the help of the Marketing department. They did an audit of our current performance and gave us recommendations on what we could improve. Those recommendations were followed and we now work with other departments on campus to diversify our communication to the alumni to include a number of new ways to stay involved on campus.
• Additional communication and engagement campaigns and activities for our alumni.
  o This was done through the creation of the Random Acts for Members initiative that is a way for us to promote and market the benefits of alumni membership while holding engagement activities at convenient times for our alumni. This program however was inefficient and has been cancelled.

• Create Pride of IPFW acknowledgements to personally reach out to high achieving and notable alumni who are doing great things in their communities.
  o This was not done this year due to a change in the priorities of campus leadership.

• Redesign Alumni website for more timely and relevant information.
  o This communication tactic was put on hold because of the broader campus funding for redesigning the entire IPFW website. We did not want to spend the staff time on updating our page if it was going to need to happen again this year.

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?

High

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

This goal was instrumental in helping our office to increase the participation and attendance at our events which helps us improve and strengthen our relationships with key stakeholders, and increase membership which led to increased funding.
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?

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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  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?

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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TASK FORCE COMMENTS AND/OR QUESTIONS:
Goal 4

1. Enter a unit goal:
   
   Create a national alumni program

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?

- Create affinity groups to grow volunteer engagement and grow our efforts in increasing the diversity of our programming. We plan to build African American, Latino, and IPFW employee affinity groups this year.
  - As mentioned above, this was very successful this year. The plan was modified due to the needs and wants of our alumni, so right now the main focus is on the employee alumni group and the African American and Latino groups are being tabled for future programming. However, the employee group was so successful that it gained the attention of a national trade publication. The employee group called the Blue and White Committee has been instrumental in providing volunteer services and social opportunities around campus to Alumni Relations and other departments.

- Create infrastructure for launching alumni chapters (charters & bylaws) by seeking advice and guidance from universities that have had success with this in the past.
  - All chapter initiatives were eliminated from our Alumni Strategic planning due to a change in Advancement leadership and the Alumni office’s decision that it was too expensive for very little return after a couple of events were held to gauge interest.

- Launch a beta chapter in Indianapolis to increase affinity and volunteer engagement in that city where 2300 of our alumni live and work.
  - Same as above, all chapter work has been halted.

- Create a strategic chapter roll out plan to build similar chapters in Chicago and other large market cities where our alumni live and work.
  - Same as above, all chapter work has been halted.

**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?
   
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9. If continuing your goal, what progress have you made or which action steps have been completed?
   
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   **CUL - # of positions needed**  Click here to enter text.

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

**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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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?

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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?

This goal is important to advertising alumni success
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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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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**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 - #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?
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   **If this goal was completed, skip to the next goal.**

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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:
   ☐ Create/Develop       ☐ Eliminate/Discontinue       ☐ Improve/Enhance
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   ☐ 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 |
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| **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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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.**

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<td><strong>Are time frames included for each</strong></td>
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<td>time frames.</td>
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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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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?

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

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| RUBRIC |
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| **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 |
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| **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?

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.
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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 |
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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. |

**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.

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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.

| 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:**
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
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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:
   □ 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?

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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.

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

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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?

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| 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 - #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?

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 |
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| 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?
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| RUBRIC |
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| 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?

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CUL - # of positions needed

Benefited

S & W — Recurring

Non Recurring

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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 |
|-----------------|-----------------|-----------------|
| **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:**