University Strategic Alignment Process Report
Indiana University – Purdue University Fort Wayne
Bursar
Part I

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

"The staff of the Bursar’s Office is charged with providing a high level of competent service to various constituencies who depend on us. Accordingly, we strive to meet the expectations of:

- Our students, who rely on us to correctly assess their fees and disburse their financial aid in an expedient manner;
- The Treasurer of Purdue University, who has delegated to us a fiduciary responsibility for collecting, depositing, and accounting for university funds entrusted to us
- Governmental agencies and private donors who demand that we serve as trustworthy custodians of their funds held for the benefit of specific students
- The IPFW community at large which looks to us to provide certain ancillary banking and financial services.

At all times, we must act in a highly professional manner. We must earn and retain a reputation of fairness. Our work must be accurate and complete. We must endeavor to treat all our constituents with courtesy and concern for their needs. Above all, we must be trusted by all who deal with us.

This is our mission. Everything we do shall be done with these principles in mind."

Assess, bill, process payments, collections, reconciliation – Student Tuition and Fees

Generate refunds for disbursed Federal, State, University, private donor awards, grants, loans, scholarships, and dropped classes

Reconcile disbursed Federal, State, University, private donor transactions from Banner to General Ledger

Reconcile cash and receivable transactions from Banner to General Ledger

Federal, State and University reporting

Support Student Organizations and Athletic travel requests

Departmental Deposits
### RUBRIC

| 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.

- Upgraded to current version of ecommerce software for TouchNet
- Upgraded to current version of supporting software for Banner
- Improved refunding process to eliminate an access database, also added additional features to assist in preventing NCAA violations
- Implemented increased communications with students to reduce outstanding receivables
- Implemented a single due date for housing receivables each term thereby eliminating student confusion
- Implemented Bursar staff cross training and customer service improvements
- Implemented improvements in the reconciliation process for scholarships and awards
- Reduced student receivables by increasing collection efforts (email, paper invoices, phone calls).
- Ongoing PCI Compliance for all IPFW credit card merchants using POS terminals enabled with EMV – P2PE (point-to-point encryption)

### RUBRIC

| 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) | The unit did not provide evidence that accomplishments align with the mission of the University. | The unit provided evidence that accomplishments somewhat align with the mission of the University. | The unit provided evidence that accomplishments align closely with the mission of the University. |

### TASK FORCE COMMENTS AND/OR QUESTIONS:
3. What program-specific accreditations or federal & state laws impact what you do?

FERPA
GLBA
HIPPA
Student Federal and State financial aid regulations; Department of Defense - Memorandum of Understanding (MOU), Stafford Loans, PELL, Perkins Loan, SEOG, Federal Work Study, Higher Education, 21st Century, CVO, National Guard Grants, etc.
Payment Card Industry Data Security Standards (PCI-DSS)
Red Flag - Identity Theft prevention

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<tr>
<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>The program has (or is working toward) accreditation and provided a basic list of constraints and/or benefits but did not analyze their impact.</td>
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<tr>
<td>The program has (or is working toward) accreditation and analyzed the impact of their constraints and/or benefits.</td>
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<tr>
<td>The unit did not address this question.</td>
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<td>The unit listed Federal/State laws and/or mandates that affect their unit but did not analyze the impact.</td>
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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?

1. Customer Service – Incoming calls are monitored by Telephone Operations software and departmental reports can be provided on a monthly basis.
   Associate Bursar has been requesting these reports to monitor the staff for the time spent on each call, longest wait time, average wait time and abandoned calls. Our current goal is to have an average wait time of 2 minutes or less.
2. Cashiering Departmental Accuracy – A log is kept to record overages/shortages for staff. Our goal is to have 100% accuracy but is about 99.8%.

3. Direct Deposit for Students – One of our goals is to increase the enrollment of students in direct deposit. Bursar has been measuring for a number of years.

5. Do you wish to provide any response to last year’s task force comments?
   Not at this time.

6. Please list the names of the authors of this USAP report.
   Pamela Michalec, Shawna Squibb, Laurie Colchin, Leah Mau
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:

   Bursar will continue to provide excellent customer service to our customers (students, parents, departments, employers) which will aid in student retention.

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?

   NA

   **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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<td>I.M.1</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?

Even though paying for college is a necessary ‘evil’, collecting fees can be done in a caring and courteous manner. The services we provide to students and their parents have an impact on their perception of the University. Providing excellent service increases overall confidence in the University.

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

Customer service and teamwork training will be delivered at least quarterly in order to keep this top of mind. We also have traveling trophies for both customer service and teamwork that are passed from front line to operations area and vice versa.

We have all taken a Strengthsfinder test and use these strengths when looking at project assignments and working together.

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

Continued quarterly training in order to keep top of mind.

Traveling trophies allowing teammates to recognize each other.

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| 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?

This will be measured by ensuring phone calls coming into our call que are answered in a timely manner, no longer than a 2 minute wait time and by ensuring our transactions are processed accurately.

Feedback from other departments and limited number of complaints to leadership.

Survey of students being 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). | 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?

   Yes, when fully staffed and not assigned to outside projects.

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?

   Management will research, prepare, and present training on customer service. Front line will learn and apply training.

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?

   N/A

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  N/A

   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?
N/A

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<td>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.)</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?

Turn over of staff or lengthy medical leave of staff. Turn over often the result of lower than market pay rates at the clerical and operations level.
**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:**

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

1-2 years

Dates: 07/01/2015 – 06/30/2016

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**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 2

1. Enter a unit goal:

   Bursar will effectively bill and collect student account receivables which bring in revenue to the university.

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?

   N/A

   **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>
<tr>
<td>I - Foster student success</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
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<tr>
<td>2nd 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>3rd Plan 2020 Goal</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>Choose an item.</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?

The collection of fees supports every strategic goal.
9. If continuing your goal, what progress have you made or which action steps have been completed?

Billing statements have been simplified with one line item for housing each semester rather than having multiple line items with differing due dates.

Creating a new reporting view in banner which will enable improvements to the collections process and reporting.

Attended Banner / Ellucian user conference. New functionalities learned.

Attended COMTEC conference. New functionalities learned.

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

Implementation of new view and reporting features.

Elimination of employee representing University at Small Claims Court, utilize employee for increased outbound collection efforts.

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

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

With added reporting features we will be able to develop metrics.
**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?

   Partial

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?

   N/A

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

   Account collection manager no longer responsible for representing University in Small Claims Court, time will be utilized to increase in-house collection efforts.

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

   Increasing in-house collection efforts. Additional billings and calls to students with delinquent accounts.
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.

<table>
<thead>
<tr>
<th>CUL - # of positions needed</th>
<th>1</th>
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<tr>
<td>Benefited</td>
<td>Yes</td>
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<tr>
<th>S &amp; W — Recurring</th>
<th>Yes</th>
<th>$$: 25,000.00</th>
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<tbody>
<tr>
<td>Non Recurring</td>
<td>Select Yes/No</td>
<td>$$: Click here to enter amount.</td>
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<tr>
<th>S &amp; E — Recurring</th>
<th>Yes</th>
<th>$$: 2,000.00</th>
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<tr>
<td>Non Recurring</td>
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<th>Equipment — Recurring</th>
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<th>$$: 5,000.00</th>
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<td>Non Recurring</td>
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Other: Describe: N/A

| 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?

Full time collection clerk.

**RUBRIC**

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<tr>
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<th>No budget information is provided.</th>
<th>Budget plan is included but is not clearly stated.</th>
<th>Goal has a clearly stated budget plan.</th>
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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?

N/A

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**TASK FORCE COMMENTS AND/OR QUESTIONS:**
Goal 3

1. Enter a unit goal:
   Strengthen credit card mail-in/phone-in procedures to comply with Payment Card Industry - Data Security Standards

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

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<td>Clearly stated challenges are included for this goal.</td>
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</tbody>
</table>
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:

   Bursar will ensure its fiduciary responsibilities to the University are met by reconciling accounts on a monthly basis.

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?

   N/A

   **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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<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?

Purdue University has escalated the clearing of unreconciled account balances. These must be cleared by fiscal year end and maintained going forward on a fiscal basis. Impact could be significant fines and loss of participation in federal and state financial aid programs.

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

Temporary accounting professional hired from an outside employment agency in order to assist in the reconciliation of account balances.

All cash accounts continue to be reconciled on a monthly basis.

Identified and resolved inefficiencies in Account Clerk V duties.

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

Assignment of business manager to assist in Bursar reconciliation.

Reallocate duties to Account Clerk V to assist in the monthly reconciliation of scholarships, grants, and alternative loans.

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<td>Do the unit goals align with the University’s goals?</td>
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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?

Monthly reconciliations of bank, scholarships, grants, and alternative loans to be completed by the 15th of each month.

By the end of fiscal year 2016, unreconciled balances will be cleared and processes will be established to ensure continued reconciliation and compliance with federal and state regulations.
**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?

Partial

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?

N/A

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

Account Clerk V process efficiencies identified and time reallocated to reconciliation.

Bursar, Associate Bursar, and Assistant Bursar are continually reallocating time to this project which takes time away from other duties, projects, process improvements, reporting, metrics development, training of staff, etc…

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

Bursar will complete the monthly reconciliations of University bank statements to the university records for the following bank accounts:

Student Refund account (University Revolving Bank Account)

Athletics Cash Advance account (University Revolving Bank Account)

IPFW Foundation Bank Account
Student Organizations Bank Account (funds raised by 106 student organizations)

Bursar will complete the reconciliation of student information system (Banner) to the general ledger in SAP for the following:

Federal Grants and Loans (PELL, Direct Loans, SEOG, Perkins Loans)

State Grants and Scholarships (21st Century, Higher Education, National Guard Grant, CVO, Mitch Daniels Scholarship, Minority Teach Scholarship, Nursing Scholarship, etc.)

Third Party Scholarships (these scholarship come in from hundreds of companies, foundations, churches, etc.)

Alternative Loans

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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<tr>
<th>CUL - # of positions needed</th>
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<tr>
<td>Benefited</td>
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<th>S &amp; E — Recurring</th>
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Other: Describe: N/A

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

Current Assistant Bursar position modified from Operations Assistant to a professional level. New clerical position created to report to and reconcile additional account balances and shift current reconciliation from Bursar, Associate Bursar, and Assistant Bursar.

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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?

N/A

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| TASK FORCE COMMENTS AND/OR QUESTIONS: |

19. What is your timeline for accomplishing this goal?

1-2 years

Dates: 07/01/2015 – 06/30/2017
| 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 5

1. Enter a unit goal:

Bursar will ensure its fiduciary responsibilities to the University are met by accurately requesting, claiming, depositing and returning of cash (cash, checks, credit cards, electronic funds), federal, state, and private funds.

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?

N/A

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:

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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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<td>IV - Create a stronger university</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?

Ensures funds are allocated to the correct Accounts - to support the financial health of the University.
Accurately returning funds to the correct federal and state entities ensures our compliance with federal and state regulations.

Maintaining this goal directly supports Goal # 4. If this goal is not maintained impact could be significant fines and loss of participation in federal and state financial aid programs.

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

Access to State and Federal websites has given us information to improve accuracy in depositing funds into the correct general ledger accounts (SAP).

Improvements are also being made in the refunding of State and Federal Aid processes.

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

Bursar office will accurately claim and deposit into the correct IPFW general ledger accounts (SAP), funds received from:

All campus credit card transactions,
State Grants and Scholarships,
Daily bank deposits,
Electronic payments from students and third parties,
Private loans,
Federal Grants and Loans

We will accurately request Department of Education funds for all student PELL grants, Direct Loans, Supplemental Grants and Federal Work Study Programs.

We will ensure these funds are accurately transferred into the correct IPFW general ledger accounts (SAP),

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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?

The accurate and timely claiming of funds will be measured by a daily review of Purdue Treasury reports and a monthly balancing process in the Bursar office and the monthly reconciliation of the Chase Bank Statement, by the Accounting Services department.

All of the above processes require balancing to a zero outstanding balance. If a zero balance is not achieved, a detailed explanation of the outstanding issues is provided, and cleared as soon as possible.
Annual reporting to the Department of Education (FISAP) of federal campus based funds.

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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?

Assistant Bursar will continue to analyze and create improvements to ensure accuracy in this area.

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?

N/A
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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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?

N/A

| 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?

The Treasury report, provided by Purdue, includes all payments/deposits for all four Purdue campuses. One challenge is to ensure we identify and claim all student related funds that belong to the IPFW campus.

Prioritizing Time

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| TASK FORCE COMMENTS AND/OR QUESTIONS: |

19. What is your timeline for accomplishing this goal?

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| TASK FORCE COMMENTS AND/OR QUESTIONS: |
Goal 6

1. Enter a unit goal:

   Bursar's Office will increase the number of students who utilize their Busar Student Account (accessed through my.ipfw.edu) from 20% to 50% of the currently registered 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 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?

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

The number one complaint received about the Bursar’s office is the hold process which prevents students from registering for future classes or obtaining a transcript. With all of our billing processes occurring online via the Bursar Student Account, the best way for a student to know whether their account is in good order is to log in and review/understand their account. We send electronic notifications to their student email making them aware of eStatements and reminding them of upcoming due dates, past dues, potential Administrative Withdrawl, etc. If the students understand the status of their Bursar Account early they will be better able to seek additional resources and resolve issues so that they can focus on their studies throughout the semester and not have the financial concerns in the back of their minds. This will also eliminate surprises and hurdles when it comes to continuing on into the next semester.

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

We asked for Marketing help and were referred to Printing Services. They have a person who can help create materials to use across campus to bring awareness. A Bursar Office mascot, Money Don, was created to raise awareness across campus. He will be used in our brochures and literature used to sell students on the various services we can provide in the Student Account (direct deposit, text reminders, scheduled payments, payment plans, eStatement retrieval, authorized user). He is being rolled out for Spring 2016.

Continued “selling” and education to students and parents of account features by the Bursar office staff when servicing students and parents.

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

Additional banners and handouts will be printed and utilized. Hoping to work with Admissions to become a larger part of the onboarding process for new students.

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

Usage reports from the Touchnet software used by Bursar for servicing of student account.

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

Partial

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?

Associate Bursar is able to piecemeal communications as time allows. Unable to dedicate significant time due to primary responsibilities. If the other positions were approved and reconciliation duties transitioned, extra projects such as this would be able to be achieved or if more assistance provided by Marketing to the entire New Student Orientation process were given this could be incorporated into that marketing plan.

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:  

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

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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?

Time and talents…we are good at taking care of students and processes and administration of receivables. We are not skilled in creating marketing plans. We will continue to utilize whatever resources we can and talk/teach students about all we have to offer to resolve many of their questions and frustrations about the business side of the university and understanding how much they owe.

**RUBRIC**

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

19. What is your timeline for accomplishing this goal?

3-5 years

Dates: 07/01/2015-06/30/2020
### 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:
   Cross train all front line Bursar clerks in all duties.

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

3. If goal has been completed, what was the impact on your unit and Plan 2020?
   N/A
   **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
   - [x] Improve/Enhance
   - [x] 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?

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

This will improve overall customer service and efficiency in daily tasks. With all clerks being trained on specific tasks such as Student Organization Accounts, Athletic cash advances, and Departmental deposits they will better be able to answer specific questions from customers. This will alleviate the need to refer them to another clerk and more efficiently process these transactions.

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

Rotating schedule of clerical duties between clerks.

Supervisor and peer training.

Maintain updated procedures for tasks.

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

Continue with the previously mentioned completed action steps.

Rotating schedule of clerical duties between clerks.

Supervisor and peer training.

Maintain updated procedures for tasks.

| 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?

Tasks will be accomplished by all clerks accurately and efficiently with minimal questions to supervisor.
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?

Supervisor will assign tasks and plan the cross training of those tasks. Peer training will be utilized to ensure the person who is currently doing the task is able to convey the most up to date and efficient way of doing the task.

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?

N/A
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**  N/A

**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.

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

N/A

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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?

Need to be fully staffed in order to accomplish this goal. When turnover occurs we must start over again with cross training.

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

19. What is your timeline for accomplishing this goal?

1-2 years

Dates: 07/01/2015 – 06/30/2016

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**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.

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 |
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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?** | 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

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?
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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.)

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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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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.

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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?
   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.

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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?

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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?

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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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?
   
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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 - #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.

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 |
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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.

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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?

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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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   Benefited  Select Yes/No

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   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?

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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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### 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 - #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?

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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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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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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 Click here to enter text.
Benefited Select Yes/No

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

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

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| 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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