Part I

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

Administrative Business Services partners with the IPFW community to support student success:

   By delivering quality financial and procedural information and services needed to best fulfill their specific missions while balancing risk and opportunity.

   Providing stewardship of the University’s fiscal resources within the framework of federal, state and university policies.

   Encouraging innovation and promoting efficiency and effectiveness of operations.

   Valuing our human resources through acknowledging excellence, fostering personal growth and appreciating individual potential and effort.

   Treating everyone with fairness, equity and courtesy, regardless of individual differences.

| 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. |

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

The accomplishments below are including those completed by the Senior Business Manager, various Business Managers and their staffs for the reporting period of Jan. 1, 2015 – June 30, 2015. The Business Manager for Athletics, Physical Plant and the Chancellor now report to their respective areas and consequently their accomplishments will not be included in this report.
- Provide ongoing training/support to the IPFW community on new system-wide software and processes
- Work with Budget Office on creating report used to compile budget data for departments
- Provide reporting support to all departments within IPFW in the implementation of the new budget process
- Provide support to the Budget Office in creating various reports and compiling data requested by Purdue’s Budget Office
- Work with various departments (HR; Accounting Services; Specific Organizations/Departments involved in the changes; etc.) on the numerous tasks (Account set-up; Process necessary Budget Transfers and Journal Vouchers; Organizational changes; Departmental and/or Fiscal Signature Delegation changes; etc.) necessary for the successful implementation of IPFW organizational changes
- Provide financial data for the Vice Chancellor Academic Affairs S&E Working Group project
- Collaborate with the department of Institutional Research and Analysis by providing data and review of departmental profiles
- Provided financial data for Higher Education Arts Data Services report for VCD, Fine Arts, Interior Design, Music and Theatre
- Improved efficiency of the payroll process within the Division of Continuing Studies with the use of the APEX reporting tool, Excel and the emailing of contracts; Estimated time savings of two weeks; DCS processes hundreds of payroll contracts each semester
- Conducted six training sessions on University policy and procedures to over 250 student organization officers
- Served as “Super User” in the on-boarding of COMMUNITY – a new comprehensive student organization management system
- Managed comprehensive “clean up” of Student Organization Internal Billing Accounts
### 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?

   Administrative Business Services helps provide necessary reporting to the various Academic Units for Accreditations. While there are no accreditations for our unit, the following certifications do apply:

   All Administrative Business Services staff must maintain the following certifications:

   - Enterprise Certifications
     - FERPA – Family Educational Rights and Privacy Act
     - GLBA – Gramm-Leach-Bliley Act
     - Protecting SSNs
     - Data Handling
   - The Office of Treasury Operations
     - PCI DSS – Payment Card Industry Data Security Standards
     - Public Records
     - HIPPA Compliance – Health Insurance Portability and Accountability Act
     - Identity Theft Red Flags

   ABS must also comply with all federal and state laws and regulations associated with accounting and budgeting best practices, including IRS regulations/guidelines.
RUBRIC

| To what extent did the unit evaluate the impact of accreditation constraints and/or benefits? | The program has (or is working toward) accreditation but did not provide any information regarding constraints and/or benefits. | The program has (or is working toward) accreditation and provided a basic list of constraints and/or benefits but did not analyze their impact. | The program has (or is working toward) accreditation and analyzed the impact of their constraints and/or benefits. |

| TASK FORCE COMMENTS AND/OR QUESTIONS: | The unit did not address this question. | The unit listed Federal/State laws and/or mandates that affect their unit but did not analyze the impact. | The unit listed Federal/State laws and/or mandates that affect their unit and analyzed the impact. |

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?

This report includes data for Fiscal Year 2015 (Jan. – June 30, 2015). While goal specific metrics were included when last year’s report was written the following metrics were established (Oct. 2015) by the VCFAA for Administrative Business Service moving forward:

- Maintain an 80% approval rating of “doing as expected” or higher (as calculated from annual survey) on providing customer valued quality service to the university community. This will include being available and receptive; being a positive participant in the various departmental activities; providing ideas, feedback and accurate information; being a creative thinker to help solve issues that may arise; keeping all parties informed and understanding how changes will impact them; and being open to change and learning new processes and policies to provide efficient and effective customer service.

A survey will be created to provide the results for this metric for Fiscal Year 2016. This metric will be tied to both the training and documentation goals. Proper training and documentation are both necessary to providing the expected level of customer service.
• Provide financial stewardship and accountability through reports to the respective VC/Dean/Dept. Head/Director on departmental accounts to help them create/maintain a budget/spending plan. Ensure that 100% of personnel cost distributions are addressed monthly and corrections are made before subsequent payroll run; 100% of departmental accounts are reviewed monthly with any negative accounts corrected and/or documented on why immediate correction is not possible; Ariba reconciliations handled within 30 days or a follow up/comment will be made for those unable to be reconciled for reasons outside of Admin. Business Services control.

In the reported months of Fiscal Year 2015, a committee was put together to find the appropriate reports to provide the data needed. With the recent access to Cognos FI reporting, this has been an ongoing process as new standardized reporting has been created and presented and training in relation to the financial data has been rolling out.

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

N/A

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

Diana Jackson
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:
   
   Enhance the knowledge and skill level of department staff.

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.

<table>
<thead>
<tr>
<th>1st Plan 2020 Goal</th>
<th>Area I Goals</th>
<th>Area II Goals</th>
<th>Area III Goals</th>
<th>Area IV Goals</th>
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<tr>
<td>I - Foster student success</td>
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<th>2nd Plan 2020 Goal</th>
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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?

With the level of change in administration, policy, processes, software, etc. within Purdue system-wide and IPFW in particular it is not only important but essential to be intentional about training. Administrative Business Services touches all departments across the campus and is in many cases ABS is used to communicate/share changes with departments.

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

- As part of the USAP goal process all ABS staff met to put together a list of essential training needed on new or ongoing software/procedures. It was decided that the following training was required for all staff:
  a. Concur
  b. Payroll Dashboard
  c. Online Performance Evaluations
  d. Yearly Certifications
  e. HR – Risk Management
  f. Business Intelligence – HR
  g. Training on new deposit process (CRV)
  h. Ariba Contract training
  i. Correcting Document Training

- As of June 30, 2015 all ABS staff had participated in training on each software/process listed above with the exception of Ariba Contract Training and Correcting Document Training. This is planned in Fiscal Year 2016.

Additional training on Cognos reporting with the Business Intelligence Financial data has been added as essential training for Fiscal Year 2016.

A training outline/checklist has been started to provide a list of essential topics that new Business Managers need to master to be effective, efficient and informative for ABS and all departments they interact with.
10. What action(s) does your unit plan to take to support this unit goal?

ABS collaborates with Purdue when possible to utilize their training resources. When needed, staff are provided funding to attend professional development opportunities. Monthly one-on-one meetings will be set up between the Business Managers and the Senior Business Manager to discuss any specific training needs. A training committee has been created to track the progress of this goal and to discuss future training topics that are needed.

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

Tracking attendance at required training; Meet with Senior Business Manager to add any staff specific training plans; Complete a new Business Manager training schedule; and finally Survey the IPFW community (Deans; Dept. Heads; Directors; etc.) that interacts with ABS staff on their approval.

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<tr>
<td><strong>Are clearly stated performance measures provided for each goal?</strong></td>
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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?

We do not have enough staffing resources (not only people but also skill sets) to provide all of the necessary training. But, we have been able to collaborate with various departments at Purdue along with various departments within IPFW to provide the needed training. We did have enough funding to pay for the travel of those providing training (it has generally been minimal).

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.

N/A

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

Because of efforts to collaborate we have been able to utilize resources from other areas to provide any training needed.

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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<th>Benefit Type</th>
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<tr>
<td>Non Recurring</td>
<td>Select Yes/No</td>
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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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<tr>
<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>
</tr>
</tbody>
</table>

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?

Business Manager time; Continuing changes to software; processes; policies; personnel
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<tr>
<td><strong>Are clearly stated challenges identified for each goal?</strong> (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.</td>
</tr>
<tr>
<td>Challenges are not included in the unit’s report.</td>
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<tr>
<td>Challenges are listed but they are not clearly stated.</td>
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<tr>
<td>Clearly stated challenges are included for this goal.</td>
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**TASK FORCE COMMENTS AND/OR QUESTIONS:**

19. What is your timeline for accomplishing this goal?

1-2 years

Dates: July 1, 2015 – June 30, 2016 (for the training items mentioned; for the creation of a New Business Manager Training schedule); Ongoing for training in general;

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<td><strong>Are time frames included for each performance measure (metric)?</strong></td>
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<td>No time frames are included with the performance measures.</td>
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<td>Some of the performance measures include time frames.</td>
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<td>All performance measures include time frames.</td>
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**TASK FORCE COMMENTS AND/OR QUESTIONS:**
Goal 2

1. Enter a unit goal:
   Create plan for the documentation of critical and/or routine tasks and procedures

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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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?

Administrative Business Services touches all departments across the campus and as such it is important that all necessary activity continues even when Business Managers and their staff change or are out of the office for varying reasons and varying lengths of time.

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

Guidelines have been created for the documentation of critical and routine tasks. The guidelines outline the need to include the due date of these tasks along with the frequency, importance, customer (who receives the report/information) and where/what reports or individuals are used to retrieve the information. The documentation needs to be useful but not overwhelming.

A Vibe space has been created to provide a central location for documentation.

A general Task List has been started (additional work is needed to complete the Task List)

A committee has been put together to provide review and maintenance of the documentation.

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

Senior Business Manager will continue to communicate to all ABS staff the importance of complying with this goal; will look at other possible outside sources (ex. Purdue’s Business Office) to get help with putting together the general task list; and will provide any necessary S&E funding. If necessary will look for student help in compiling and maintaining the documentation in the Vibe space created

| 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?

   The creation of the requested documentation (timeline; task list; ad hoc issues) in the stated time period; Survey the IPFW community (Deans; Dept. Heads; Directors; etc.) that interacts with ABS staff on their approval of services provided

<table>
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<tr>
<th>Are clearly stated performance measures provided for each goal? (Performance measures are considered ‘clearly stated’ if a benchmark and quantitative measurement is included).</th>
<th>The unit provided performance measures but they are not clearly stated.</th>
<th>Some of the stated performance measures are clearly stated.</th>
<th>All performance goals are clearly stated.</th>
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**TASK FORCE COMMENTS AND/OR QUESTIONS:**

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

   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?

   Staffing resources - Business Managers and their staff will create the necessary documentation; any necessary collaboration with other departments (ex. Purdue Business Office) will be pursued. Possible additional training may be needed for the use of Vibe

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.

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<th>CUL - # of positions needed</th>
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S & W — Recurring

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Non Recurring

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?

N/A
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 needed by staff to complete the documentation; Working through inconsistent interpretation of policies/procedures; Continuing changes to software; policies; procedures

19. What is your timeline for accomplishing this goal?

   1-2 years

   Dates: Fiscal Year 2016 – Create Task List; Departmental Timelines Created; Compiling the documentation in Vibe; Create schedule for review
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<td>No time frames are included with the performance measures.</td>
<td>Some of the performance measures include time frames.</td>
<td>All performance measures include time frames.</td>
</tr>
</tbody>
</table>

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


Goal 3

1. Enter a unit goal:
   
   Review and enhance the Administrative Business Services provided to the IPFW Community

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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<tr>
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<th>Area IV Goals</th>
</tr>
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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>IV.A - Measurement and metrics</td>
</tr>
<tr>
<td>2nd Plan 2020 Goal</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>IV.B - Efficiency</td>
</tr>
<tr>
<td>3rd Plan 2020 Goal</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td></td>
</tr>
</tbody>
</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?

Maintaining and communicating the financial health of all departments is essential in helping all parties use their resources strategically and allows them to actively manage all accounts and unspent funds. It helps to provide proper controls with the spirit of protecting departmental resources and reputation.

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

Performance expectations in relation to personnel cost distributions; Pcard reconciliations; Ariba Reconciliations; Negative Account balances were identified and communicated.

Pcard Reconciliations: Prior to the Pcard closing cycle, Purdue Accounting provides a monthly report listing Pcard transactions that require reconciling. For the reporting period of this report, 100% of all Pcard transactions were reconciled (this includes thousands of transactions each month). Because 100% of all Pcard transactions were reconciled within the six months of this reporting period, ABS will not include this measure as part of the measurement goals for Fiscal Year 2016 (it will still be monitored)

Ariba Reconciliations: Received Ariba report training; Ariba reconciliation report was created to provide monthly reports that will be disbursed to all Business Managers for follow up

Account Balances: Cognos report training was received; Monthly reports (Budget v Actual; Account Balance Listing) will be run and sent out to the Business Managers for review and action.

Personnel Cost Distributions: HR Payroll default report was created by Purdue Accounting Services. Report will be run monthly and sent out to the Business Managers for review and action

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

Identify and communicate appropriate performance expectations for cost distributions, monthly account review, Ariba reconciliation; Implement committee to review quarterly and follow up on any issues identified; Create a plan on best practices to continue to meet expectations; Continually review newly created standardized reports looking for most efficient resource.
11. With what metrics will you assess progress toward accomplishing this unit goal on an annual basis?

100% of personnel cost distributions are addressed monthly and corrections are made before the next payroll run (use HR default report)

All departmental accounts will be reviewed monthly with negative balances corrected or documented as to why they are negative and immediate correction is not possible (use Cognos Budget v. Actual report and Account Balance report).

Reconciliations within Ariba will be handled within 30 days or a follow up comment will be made for those unable to be reconciled for reasons outside of ABS control (use Ariba reconciliation report)

Committee is set up and a plan is created to maintain compliance

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?

All reports will be run monthly and sent out to the Business Managers for review and action; Progress will be tracked and communicated;

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.
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. |

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?

Staff time; Responsiveness of Ariba vendors and Purdue accounting or procurement staff to questions/issues; Organizational changes and subsequent related accounting tasks

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?

1-2 years

Dates: Fiscal Year 2016: Ensure that 100% of all personnel cost distributions are addressed monthly and corrections are made before subsequent payroll run; 100% of departmental accounts are reviewed monthly with any negative accounts corrected and/or documented on why immediate correction is not possible; Ariba reconciliations handled within 30 days or a follow up/comment will be made for those unable to be reconciled for reasons outside of ABS control.

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

1. Enter a unit goal:

   Establish a plan/schedule for an educational/non-paid internship within Administrative Business Services to be available Fall 2015

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?

   Because the goal was the establishment of a plan/schedule for an internship within ABS the impact on our unit and Plan 2020 during the period included in this report was minimal other than it did help to provide some level of documentation (goal 2) in preparation for the internship. While a number of the Business Managers do have direct student contact the planning of an internship also provided a level of excitement to work directly with an IPFW student discussing tasks they are knowledgeable and interested in. The larger impact will occur with the implementation of the internship in the fall semester and will provide student engagement.

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

4. If eliminated or modified, state reason:

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

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

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

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

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

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

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

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

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<tr>
<td>I.B.1</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>I.B.5</td>
<td>Choose an item</td>
<td>Choose an item</td>
<td>Choose an item</td>
</tr>
<tr>
<td>3rd Plan 2020 Goal</td>
<td>I.M.2</td>
<td>Choose an item</td>
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<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?

   Offering an internship has the potential to provide additional help to the Business Manager. While on a small scale the internship can offer the student relevant work experience and networking opportunities which has the ability to aid in post-graduation success.

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

   A schedule and plan for meeting with the Senior Business Manager and various Business Managers was created. Discussion with the Doermer School of Business Counseling department was initiated to determine how this could be used in relation to the School’s “Passport Points” program and to help line up interested students.

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

    Collaborate with the School of Business to find interested students; Set up schedule for student(s) to meet with the various Business Managers and the Senior Business Manager; Obtain feedback from intern after completion of program; Create committee to keep the project on track

| 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?

    Internship is implemented; Feedback from Business Managers on participation in the internship; Feedback from “exit” discussion with student(s) participating in the internship
| 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

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?

   Initial internship will be unpaid; Possibility of using PT wage resources for a paid internship

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

| 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?

Limited Business Manager time; Identifying all necessary/potential collaborations; Dealing with the unknowns of a new project ABS has not undertaken before

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<td>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.</td>
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19. What is your timeline for accomplishing this goal?

1-2 years

Dates: Fiscal Year 2016 – Obtain names of interested business student(s) from advising office within the School of Business; Set up schedule with student(s) and participating Business Managers; Receive feedback

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<th>TASK FORCE COMMENTS AND/OR QUESTIONS:</th>
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</table>

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Business Office - USAP Report  Page 34
New Goals for 2015-2016 - #1

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

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

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

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

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

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

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

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

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<tr>
<td>2nd Plan 2020 Goal</td>
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<tr>
<td>3rd Plan 2020 Goal</td>
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7. Is the unit goal a high, medium or low priority?

Click here to choose.

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

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

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

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<tr>
<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>

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

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

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

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

Click here to enter text.

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

Click here to enter text.

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

Click here to enter text.

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

- **CUL - # of positions needed**
  - **Benefited** 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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**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.

| TASK FORCE COMMENTS AND/OR QUESTIONS: |   |

| 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. |
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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<td>3rd Plan 2020 Goal</td>
<td>Choose an item.</td>
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7. Is the unit goal a high, medium or low priority?

Click here to choose.

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

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

Click here to enter text.

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

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? | 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?

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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

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?

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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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<tbody>
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<td>measure (metric)?</td>
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</tbody>
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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.

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<th>Area II Goals</th>
<th>Area III Goals</th>
<th>Area IV Goals</th>
</tr>
</thead>
<tbody>
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<td>1st Plan 2020 Goal</td>
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<tr>
<td>2nd Plan 2020 Goal</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
</tr>
<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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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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| 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. |

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

Click here to enter text.

---

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

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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.

<table>
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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.

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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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<tr>
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<td>2nd Plan 2020 Goal</td>
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<td>Choose an item.</td>
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7. Is the unit goal a high, medium or low priority?

Click here to choose.

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

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

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

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

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

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

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

CUL - # of positions needed  
Benefited  
S & W — Recurring  
S & W — Non Recurring

S & E — Recurring  
S & E — Non Recurring

Equipment — Recurring  
Equipment — Non Recurring

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 - #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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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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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: