2015

University Strategic Alignment Process Report
Indiana University – Purdue University Fort Wayne
Community Research Institute
Part I

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

The mission of the Community Research Institute (CRI) is to support the growth and vitality of northeast Indiana. The Institute serves as one of the portals linking expertise at IPFW with the needs of public, private, and non-profit leaders in northeast Indiana. CRI provides paid contract-based research and analytical services through ongoing support, special in-depth reports, presentations, and economic commentary. Our service areas include:

- Demographic and economic data analysis
- Fine-grain occupational, industry, and education data and analysis from EMSI
- Strategic planning
- Public policy
- Urban planning
- Economic, workforce, and community development support
- Benchmark and performance metric tracking

This data is used by our community partners, like the Northeast Indiana Regional Partnership, City of Fort Wayne, Allen County, Greater Fort Wayne Inc., and others to answer questions like:

- What type of high-wage jobs should our region pursue?
- What will the impact of the retirement of baby boomers have on area businesses, and what is the projected need for workers in the most affected industries?
- What types of new technologies are being patented in our region? How can those be leveraged for further economic opportunity and investments?
- What type of quality of life projects should be built in Downtown Fort Wayne and throughout the region so that we can better compete with areas like Chicago and Indianapolis for workers and population growth?

The Institute carries out its mission through engaging in paid Technical Assistance Agreements, working with the media, and participation in critical community development activities as an IPFW representative. Because of CRI’s expertise and understanding of the dynamics of the northeast Indiana economy (including in-demand career areas and alignment with degree programming), CRI also participates as an advisor on these issues within the campus community.

CRI has a staff of three (research assistant, research associate, and director) and the majority of our expenses are covered by contract revenue. The Director of CRI is a practitioner (not a professor) and is required to teach one course within the Department of Public Policy each semester. CRI also collaborates with similar business research centers located at IU-Bloomington and Purdue’s main campus. The Institute is located in downtown Fort Wayne and is housed with a group of regional economic and workforce development organizations with which CRI frequently collaborates. This year, the IPFW Office of Engagement also joined our suite.

CRI provides critical services and expertise which promote informed economic advancement of our region. This is a core tenet of IPFW’s stated mission.
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.

I. Foster Student Success

- I.B.1 Increase opportunities for engaged and experiential learning including service learning and internship programs.

- I.C.8 Respond to regional demand with appropriate post-baccalaureate credentials.

- Alongside the Northeast Indiana Regional Partnership, CRI is currently co-facilitating activities of the regional College to Career Action Team (CoCAT), which is supported by the Lilly Endowment. CoCAT has a dual charge. (1) Identify regional higher educational needs driven by the market and identify gaps and redundancies which affect talent supply. (2) Increase experiential learning activities and establish a regionally coordinated approach to tracking academic internship/co-op/clinical engagements.

- CoCAT includes career advisors from all regional universities who are collaborating to collect data, improve job placements, and increase participation in internships. In FY 2015, CRI and a partner out of Chicago (Center for Adult and Experiential Learning) completed an assessment of high school through university educational programming in Northeast Indiana and its alignment with identified economic sectors of importance (e.g. manufacturing, health care, insurance, IT, etc.)

- Collaborated with Office of Engagement to submit a proposal to Purdue to utilize $45,000 of Lily Endowment grant funding to support the development of promotional materials for students to raise the awareness of in-demand career paths for Northeast Indiana. If funding is received, it could be a nice overlap with the Office of Student Success and Transition’s freshman orientation and new Pathways program that encourages students on a soft path to choosing a major earlier in their tenure at IPFW.

- Completion of the Employment Outlook summary for the USAP process, which compared the projected need of occupations within northeast Indiana with the existing programming at IPFW and all 4-year degree institutions within the region. This included
a full scan of what competing institutions are offering and IPFW’s alignment with the region’s economic and workforce needs.

III. Serve as a Regional Intellectual, Cultural, and Economic Hub for Global Competitiveness

III.D Provide non-credit enrichment experiences for the community

- The Director makes presentations at the request of various community groups with the purpose of educating citizens on the dynamics of our regional economy. This work is typically supported by our TAAs, but this is not always the case. In the last year, presentations have been made to the following groups with attendance ranging from 10-450 participants:
  - IPFW Community Advisory Council
  - CEO Groups for Greater Fort Wayne Inc.
  - Northeast Indiana Regional Partnership: multiple events
  - Young Leaders of Northeast Indiana: My City Summit
  - Kiwanas Club
  - IU Regional Economic Forecast Panel
  - Quarterly economic updates to the Allen County Board of Commissioners

III.E: Provide leadership in regional economic development.

- CRI is a trusted advisor and go-to resource within northeast Indiana for impartial, reliable data and economic development planning guidance. Our work ranges covers a wide range and includes economic impact analyses, surveys, economic and demographic data analysis, strategic planning, facilitation, website assistance, and other services. The Director is in frequent collaborations with the media, economic development staff and board leadership, and elected officials with the purpose of providing technical assistance and impartial data to inform sound strategies to enhance community vitality. Along with Sean Ryan, Director of Engagement, CRI is the leading unit in the IPFW community connecting the university with regional economic development efforts. It is the core of our mission and why CRI was founded 32 years ago.

- CRI executed 23 paid Technical Assistance Agreements in FY 2015 with 15 community and university partners, totaling $209,630 in revenue. The most significant achievement in providing leadership in regional economic development was securing $42 million in Regional Cities funding from the Indiana Economic Development Corporation. Management of this process was our largest TAA engagement in FY 2015.
  - The Director of CRI served as the project manager for Northeast Indiana’s “Regional Cities” application (The Road to One Million Plan), submitted to IEDC in September 2015. Application was fully funded at $42 million by Governor Pence and the Board of Directors of the Indiana Economic Development Corporation. Funding will be used to advance social, economic, and cultural projects that improve quality of place in our region. IPFW’s Center for Leadership was included in the application.
III.O.2a: Triple the number and increase value of technical assistance agreement like contracts and consultations with regional business and industry to $1 million annually.

- While it varies year to year, CRI engages in about 20 TAA per year totaling about $200,000. In FY 2015, CRI executed 23 paid Technical Assistance Agreements in FY 2015 with 15 community and university partners, totaling $209,630 in revenue.
- Staff capacity, economic development project potential, Purdue policies related to “overhead” rates for clients (e.g. contract upcharges), policies which set hourly billing rates, and what the market can bear contribute to these dynamics.

IV. Create a Stronger University through Improving the Support of Stakeholders and the Quality and Efficiency of the Organization

IV.A. Process Goals: Measurements and Metrics:

- CRI has advocated for inroads within the IPFW community to incorporate economic growth data into decision making processes and strategic planning. This has been accomplished mainly through the USAP process.

IV.B. Process Goals: Efficiency:

- Speaking to efficiency, CRI negotiated access to a private database called EMSI (Economic Modeling Systems International) which provides county level estimates of occupational and industry changes and projections. It also connects these dynamics with degree pathways for a localized understanding of workforce training. Full sticker price of EMSI is over $30,000 annually. CRI had short-term access to this database through grant funding and recognized the value it could bring to both our clients and the campus community. As such, the Director worked with the Purdue University Center for Regional Development on a cost-sharing agreement. CRI pays a pro rata portion of Purdue’s license, bringing costs down to $5,000 per year. For FY 2015, CRI and Purdue arranged a “research swap” and in exchange for CRI’s assistance with a project they offered to absorb our $5,000 cost for 2015.

IV.C: Process Goal: Philanthropic Support:

- Much of CRI’s work is indirectly supported by foundations. Stakeholder feedback has suggested that routing funding through the Development office has presented many logistical hurdles in the past. As a result, clients often accept foundation funding and then pay CRI through Technical Assistance Agreements.
### 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?

   None.

### 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:

### RUBRIC

| To what extent did the unit identify and analyze how Federal/State laws and/or mandates impact the unit? | 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. |

### TASK FORCE COMMENTS AND/OR QUESTIONS:

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?

   There are no metrics assigned to CRI by the VCAA at this time. Our ability to execute Technical Assistance Agreements contributes to the university’s Strategic Plan metric of $1 million in
TAA’s annually. I believe the university is currently at around $600,000 annually. CRI’s activity accounts for about $200,000 annually which is the single largest contributing unit on campus. The reminder of TAA activity flows through the Office of Engagement.

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

Task Force comments received were limited and general in nature – there was nothing specific to which to respond.

I have not yet seen the USAP unit-level budget for CRI. Last year, the budget had to be contextualized. CRI’s expense to the university was represented as $85,000, which was overstated by nearly $30,000. I asked the business office about this and it was explained to me that it is corrected through an end of year transfer that is not reflected in the budget. Please keep this in mind when reviewing submitted budgets as part of this process.

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

Ellen Cutter, AICP
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:
   Redirect Director's requirement to teach one class in Public Policy toward one focused on project-based learning with interdisciplinary potential (e.g. urban development, data analytics, strategic planning, etc.).

2. Status of goal:
   [ ] Completed  [x] 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
   [x] Other: Direction on teaching requirement is dictated by the chair of the Department. Requirement has been shifted so that the Director now serves as the internship coordinator (fulfilling Goal 2).
   **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>
</tr>
</thead>
<tbody>
<tr>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>3rd Plan 2020 Goal</th>
<th>Area I Goals</th>
<th>Area II Goals</th>
<th>Area III Goals</th>
<th>Area IV Goals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
</tr>
</tbody>
</table>
7. Is the unit goal a high, medium or low priority?
   Click here to choose.

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

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

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

   **RUBRIC**

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

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

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

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

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

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

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

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

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

16. If you answered “No” or “Partial” to Question #12, what additional resources do you need to fully accomplish this unit goal? Provide specific dollar amounts.
   
   CUL - # of positions needed  Click here to enter text.
   
   Benefited  Select Yes/No
S & W — Recurring  Select Yes/No  $$: Click here to enter amount.
Non Recurring  Select Yes/No  $$: Click here to enter amount.

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

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

Other: Describe:  Click here to enter text.

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

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

Click here to enter text.

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

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

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

Click here to enter text.
### RUBRIC

<table>
<thead>
<tr>
<th>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.</th>
<th>Challenges are not included in the unit’s report.</th>
<th>Challenges are listed but they are not clearly stated.</th>
<th>Clearly stated challenges are included for this goal.</th>
</tr>
</thead>
</table>

### TASK FORCE COMMENTS AND/OR QUESTIONS:

19. What is your timeline for accomplishing this goal?

   [Click here to choose.]

   Dates: [Click here to enter text.]

### RUBRIC

<table>
<thead>
<tr>
<th>Are time frames included for each performance measure (metric)?</th>
<th>No time frames are included with the performance measures.</th>
<th>Some of the performance measures include time frames.</th>
<th>All performance measures include time frames.</th>
</tr>
</thead>
</table>

### TASK FORCE COMMENTS AND/OR QUESTIONS:
Goal 2

1. Enter a unit goal:

Leverage CRI's contacts to strengthen Public Policy internship participation.

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: The Director’s teaching requirement has been shifted (eliminated Goal 1) and the Director now serves as the department of Public Policy’s internship coordinator.

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>
</tr>
</thead>
<tbody>
<tr>
<td>Choose an item.</td>
<td>I.B.1</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>Choose an item.</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>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>
</tr>
</tbody>
</table>

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?

CRI is extremely engaged in the community and has a myriad of contacts at organizations that align with the requirements of a public policy internships.
9. If continuing your goal, what progress have you made or which action steps have been completed?

Director has served as internship coordinator since the fall of 2015. Director also serves on the department’s Community Advisory Board and is using those relationships to promote internship opportunities aligned with focus areas within the department (public management, legal studies, criminal justice, environmental policy, health policy).

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

Director plans to collaborate with Community Advisory Board (CAB) members in the area of public management to create a coordinated and expanded list of available internships at the City of Fort Wayne, Allen County, and other organizations along with collaborative professional development opportunities for participating interns. If successful, the model could be adopted by other members of the CAB representing different areas like health and criminal justice.

<table>
<thead>
<tr>
<th>RUBRIC</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Do the unit goals align with the University's goals?</strong></td>
</tr>
<tr>
<td>Goal does not align with the University's goals.</td>
</tr>
<tr>
<td>The goal is somewhat aligned with the University's goals.</td>
</tr>
<tr>
<td>The goal is clearly aligned with the University's goals.</td>
</tr>
</tbody>
</table>

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

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

Percent of graduating PPOL majors who participated in academic internships
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?
   
   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.

| 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?

Interest and engagement of the Community Advisory Board; reassignment of internship coordination duties back to teaching; availability of paid internships
**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?

Less than 1 year

Dates: Coordination with CAB, outreach to employers and students – underway

**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 3

1. Enter a unit goal:

   Respond to demand for occupational and industry growth data from within 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?

   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>
</tr>
</thead>
<tbody>
<tr>
<td>I.B.4</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td></td>
</tr>
<tr>
<td>2nd Plan 2020 Goal</td>
<td>I.E.1</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>III.E - Regional economic development</td>
<td>Choose an item.</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?

This goal is critical because it aligns CRI’s expertise with the evolving planning needs of the University community.
9. If continuing your goal, what progress have you made or which action steps have been completed?

Community Research Institute has provided data to the USAP Task Force and campus community in the form of the “employment outlook” report and Excel tables. This includes a full scan of programs offered by all of the region’s 4-year institutions over the last decade, how those programs align with the projected workforce and business needs over the next decade, and where gaps and opportunities exist.

Participation in the USAP process has raised awareness of CRI’s capabilities and how they can add value to the University’s strategic planning efforts.

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

Continued participation as opportunities are presented.

| 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?

Short of tracking staff hours devoted to direct IPFW assistance, I am not sure this is a trackable activity given the scope and direction of academic planning and alignment is not yet known.
**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?

   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?

   There have been discussions about the potential for CRI to have a dually-appointed staff person that serves CRI and Institutional Research, in order to have appropriate and reliable capacity to service campus data needs. Because of our funding model (paid contract work with clients), IPFW would need to commit that funding stream to cover such a position and the directive would come from the VCAA level.
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.

---

**RUBRIC**

<table>
<thead>
<tr>
<th>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.)</th>
<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>
</tr>
</thead>
</table>

**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?

Staff capacity at CRI, invitation to participate by other campus units

| 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?

Less than 1 year

Dates: Currently in progress

| 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 4

1. Enter a unit goal:
   Align CRI's unpaid community engagements with IPFW strategic plan.

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

3. If goal has been completed, what was the impact on your unit and Plan 2020?
   Increased efficiency.
   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>
</tr>
</thead>
<tbody>
<tr>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>3rd Plan 2020 Goal</th>
<th>Area I Goals</th>
<th>Area II Goals</th>
<th>Area III Goals</th>
<th>Area IV Goals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
</tr>
</tbody>
</table>

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

Click here to choose.

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

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

Click here to enter text.

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

Click here to enter text.

<table>
<thead>
<tr>
<th>RUBRIC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do the unit goals align with the University’s goals?</td>
</tr>
</tbody>
</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.

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

**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.

<table>
<thead>
<tr>
<th>RUBRIC</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Are clearly stated budget plans included for each goal?</strong> (A budget plan is considered ‘clearly stated’ if it includes an amount and the funding source.)</td>
</tr>
<tr>
<td>No budget information is provided.</td>
</tr>
</tbody>
</table>

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

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

Click here to enter text.

<table>
<thead>
<tr>
<th>RUBRIC</th>
</tr>
</thead>
<tbody>
<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>
</tr>
</tbody>
</table>

**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>
<thead>
<tr>
<th>RUBRIC</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Are time frames included for each</strong></td>
</tr>
<tr>
<td><strong>performance measure (metric)?</strong></td>
</tr>
<tr>
<td>No time frames are included with the</td>
</tr>
<tr>
<td>performance measures.</td>
</tr>
<tr>
<td>Some of the performance measures</td>
</tr>
<tr>
<td>include time frames.</td>
</tr>
<tr>
<td>All performance measures include time</td>
</tr>
<tr>
<td>frames.</td>
</tr>
</tbody>
</table>

**TASK FORCE COMMENTS AND/OR QUESTIONS:**
Goal 5

1. Enter a unit goal:

Continue to explore new lines of business for CRI and enhance faculty connections.

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:  Weak alignment between Community Research Institute’s mission and research interests of Public Policy faculty.  CRI has one proposal out for an economic impact study for OrthoWorx.  If the TAA is executed, it will be done with a Doermer School of Business faculty member in Economics.

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></th>
<th>Area I Goals</th>
<th>Area II Goals</th>
<th>Area III Goals</th>
<th>Area IV Goals</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st 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>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>
</tr>
</tbody>
</table>
7. Is the unit goal a high, medium or low priority?
   Click here to choose.

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

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

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

<table>
<thead>
<tr>
<th>RUBRIC</th>
</tr>
</thead>
<tbody>
<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>
</tr>
</tbody>
</table>

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

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

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

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

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

14. If you are reallocating your current resources to accomplish this goal, please explain what specific resources will be reallocated.
   
   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
17. If you were to receive the additional resources outlined in question #16, how will they be used?

Click here to enter text.

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

Click here to enter text.
### RUBRIC

<table>
<thead>
<tr>
<th>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.</th>
<th>Challenges are not included in the unit’s report.</th>
<th>Challenges are listed but they are not clearly stated.</th>
<th>Clearly stated challenges are included for this goal.</th>
</tr>
</thead>
</table>

### TASK FORCE COMMENTS AND/OR QUESTIONS:

19. What is your timeline for accomplishing this goal?

   Click here to choose.

   Dates:  Click here to enter text.

### RUBRIC

<table>
<thead>
<tr>
<th>Are time frames included for each performance measure (metric)?</th>
<th>No time frames are included with the performance measures.</th>
<th>Some of the performance measures include time frames.</th>
<th>All performance measures include time frames.</th>
</tr>
</thead>
</table>

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

1. Enter a unit goal:

Collaborate with the Office of Engagement and participate in its client surveys for completed TAA contracts.

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>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>III.E - Regional economic development</td>
<td>Choose an item.</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>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>
</tr>
</tbody>
</table>

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?

It is important to gain client feedback for CRI’s commitment to continuous improvement. We receive client feedback all the time, but not in a formal survey format.

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?

The Office of Engagement will add CRI clients to its survey distribution list. CRI will connect our client contact information with their staff.

| 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?

TBD – depends on the questions included in the Office of Engagement’s survey. We will have more specific ideas on metrics after CRI has viewed the survey and what is captured. We imagine client satisfaction, likelihood of returning to CRI for future research needs, etc. would be metrics to track.
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?
   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.

<table>
<thead>
<tr>
<th>RUBRIC</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Are clearly stated budget plans included for each goal?</strong> <em>(A budget plan is considered ‘clearly stated’ if it includes an amount and the funding source.)</em></td>
</tr>
</tbody>
</table>

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

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

None
### 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?

   Less than 1 year

   Dates:  
   Click here to enter text.

### RUBRIC

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

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

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

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

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

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

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

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

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

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

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

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

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

Click here to choose.

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

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

Click here to enter text.

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

Click here to enter text.

<table>
<thead>
<tr>
<th>RUBRIC</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Do the unit goals align with the University's goals?</strong></td>
</tr>
</tbody>
</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.

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

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

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

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

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

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

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

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

Click here to enter text.

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

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? | 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. |
| (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. |
19. What is your timeline for accomplishing this goal?

Click here to choose.

Dates: Click here to enter text.

<table>
<thead>
<tr>
<th>RUBRIC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Are time frames included for each performance measure (metric)?</td>
</tr>
<tr>
<td>No time frames are included with the performance measures.</td>
</tr>
<tr>
<td>Some of the performance measures include time frames.</td>
</tr>
<tr>
<td>All performance measures include time frames.</td>
</tr>
</tbody>
</table>

**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.

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

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

<table>
<thead>
<tr>
<th>3rd Plan 2020 Goal</th>
<th>Area I Goals</th>
<th>Area II Goals</th>
<th>Area III Goals</th>
<th>Area IV Goals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
</tr>
</tbody>
</table>

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

Click here to choose.

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

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

Click here to enter text.

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

Click here to enter text.

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

<table>
<thead>
<tr>
<th>RUBRIC</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Are clearly stated performance measures provided for each goal?</strong> (Performance measures are considered ‘clearly stated’ if a benchmark and quantitative measurement is included).</td>
</tr>
<tr>
<td>The unit provided performance measures but they are not clearly stated.</td>
</tr>
</tbody>
</table>

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

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

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

Click here to enter text.

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

Click here to enter text.

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

Click here to enter text.

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

- CUL - # of positions needed  
  Benefited  
  S & W — Recurring  
  Non Recurring  
  S & E — Recurring  
  Non Recurring  
  Equipment — Recurring  
  Non Recurring  
  Other: Describe:

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

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

Click here to enter text.

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.

<table>
<thead>
<tr>
<th>RUBRIC</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Are time frames included for each performance measure (metric)?</strong></td>
</tr>
<tr>
<td>No time frames are included with the performance measures.</td>
</tr>
<tr>
<td>Some of the performance measures include time frames.</td>
</tr>
<tr>
<td>All performance measures include time frames.</td>
</tr>
</tbody>
</table>

**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.

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

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

<table>
<thead>
<tr>
<th>3rd Plan 2020 Goal</th>
<th>Area I Goals</th>
<th>Area II Goals</th>
<th>Area III Goals</th>
<th>Area IV Goals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Choose an item.</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?

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.

<table>
<thead>
<tr>
<th>RUBRIC</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Do the unit goals align with the University’s goals?</strong></td>
</tr>
</tbody>
</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.

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

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

Click here to enter text.

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

Click here to enter text.

<table>
<thead>
<tr>
<th>RUBRIC</th>
</tr>
</thead>
<tbody>
<tr>
<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>
</tr>
<tr>
<td>Challenges are not included in the unit's report.</td>
</tr>
<tr>
<td>Challenges are listed but they are not clearly stated.</td>
</tr>
<tr>
<td>Clearly stated challenges are included for this goal.</td>
</tr>
</tbody>
</table>

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>
<thead>
<tr>
<th>RUBRIC</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Are time frames included for each performance measure (metric)?</td>
<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:**
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.

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

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

<table>
<thead>
<tr>
<th>3rd Plan 2020 Goal</th>
<th>Area I Goals</th>
<th>Area II Goals</th>
<th>Area III Goals</th>
<th>Area IV Goals</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
</tr>
</tbody>
</table>

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

Click here to choose.

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

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

Click here to enter text.

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

Click here to enter text.

| 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?

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.

<table>
<thead>
<tr>
<th>RUBRIC</th>
</tr>
</thead>
<tbody>
<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>

TASK FORCE COMMENTS AND/OR QUESTIONS:

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

Click here to enter text.

<table>
<thead>
<tr>
<th>RUBRIC</th>
</tr>
</thead>
<tbody>
<tr>
<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>
</tr>
</tbody>
</table>

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>
<thead>
<tr>
<th>RUBRIC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Are time frames included for each performance measure (metric)?</td>
</tr>
<tr>
<td>No time frames are included with the performance measures.</td>
</tr>
<tr>
<td>Some of the performance measures include time frames.</td>
</tr>
<tr>
<td>All performance measures include time frames.</td>
</tr>
</tbody>
</table>

TASK FORCE COMMENTS AND/OR QUESTIONS: