2015

University Strategic Alignment Process Report
Indiana University – Purdue University Fort Wayne

Vice Chancellor for Financial and Administrative Affairs
Part I

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

Maintaining the financial integrity of the institution and partnering with the IPFW community to support student success by assuring adequate financial resources to carry out student-focused programs as demonstrated by:

- Balancing university revenue and expenditures each fiscal year
- Achieving an acceptable composite financial indicator (CPI) for the university each fiscal year
- Delivering quality financial and procedural information and services needed to best fulfill institutional specific missions, while balancing risk and opportunity
- Providing stewardship of the university’s fiscal resources within the framework of federal, state and university policies
- Encourages innovation and promoting cost effectiveness and efficiency of operations
- Acknowledging excellence, fostering personal growth and appreciating individual potential and effort
- Treating everyone with fairness, equity and courtesy, regardless of individual difference

| 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.

**Differential Tuition**

Because of the increased resource demands associated with nationally-accredited professional programs, we established a differential tuition rate for classes in IPFW business, computer science, engineering, and nursing departments.

Most schools charge differential tuition rates based on a student’s major, which results in those students paying more for all of their courses, even their general studies requirements. Instead, IPFW applies the differential rate to classes in the four departments, regardless of a student’s major. These specific programs have strong experiential learning components, such as clinical teaching settings, which are more costly to deliver than standard classroom instruction. Funds from differential tuition go to supporting student success in the related areas.

**Salary Adjustment**

As a result of my efforts IPFW received $500,000 from Purdue West Lafayette for one-time employee “bonus” payments of $1,000. This was done in order to enhance our funding of salary increases and one-time special payments for our faculty and staff in the last fiscal year. This re-allocation from Purdue West Lafayette was a first of its kind.

**State Funding Rescission**

The $825,000 State of Indiana rescission was rescinded. After requesting that the rescission be rescinded we were notified that Governor Pence rescinded the 2% reversion of state appropriations for FY 2015. In Fiscal Year 2013-2014 IPFW returned 2%, or $800,000, to the state and at the time we were directed to plan on an additional 2% by June 30 of 2015. The total of the two year reversion to IPFW would have been approximately $1.6 million.

**Continuing Education Revenue to General Fund and Rationalizing Athletics Budget**

One hundred percent of net fees associated with Department of Continuing Studies (DCS) classes now go into the general fund.

Historically, tuition generated by DCS courses had been deposited in a Restricted Fund separate from the General Fund. As monies were needed for particular uses (In particular, paying for Athletics at the end of each academic year), funds would be transferred out of the DCS Restricted Fund and into the appropriate accounts. Over the course of the 2014-2015 academic year, funds totaling $3,000,000 were transferred out of the DCS Restricted Fund and into the General Fund to help cover normal operating expenses. Surplus DCS revenues are now transferred to the General Fund to be used the way normal student tuition dollars are used.
Athletics is no longer subsidized via DCS. Athletics’ funding now comes from the general fund, athletic related revenue and fees.

| 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?

I am involved in many accreditation visits to IPFW. For example, I will be involved in the IPFW Department of Nursing CCNE Accreditation Site Visit, January 27-January 29, 2016.

While there are no accreditations for my units, the following certification do apply:

Selected staff must maintain the following certifications:
- Enterprise Certifications
  - FERPA - Family Educational Rights and Privacy Act
  - GLBA - Gramm-Leach-Bliley Act
  - Protecting SSNs
  - Data Handling

The Office of Treasury Operations
- PCI DSS - Payment Card Industry Data Security Standards
- Public Records
- HIPPA Compliance - Health Insurance Portability and Accountability Act
- HIPPA - Health Insurance Portability and Accountability Act
- Identity Theft Red Flags
- Red Flags
### 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:

| 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?
Performance Metrics:

- A balanced budget: Institution-wide revenues and expenses were balanced for the fiscal year ending June 30, 2014

- An acceptable Composite Financial Indicator (CFI): An acceptable CFI of 2.99 was achieved for the fiscal year ending June 30, 2014. This demonstrates that IPFW is becoming a financially healthy institution. As of June 30, 2015, the university’s Composite Financial Index (CFI) was 2.99, up from 1.61 during the 2013-2014 fiscal year. The CFI reflects the combination of four ratios that look at reserves, income, and other statistics. The Higher Learning Commission and other accrediting bodies look for institutions to have a target CFI of 3.0. This was achieved by leadership that instituted a budget development and management process that is aligning available resources with goals and priorities of the institution.

This is good news related to our IPFW Composite Financial Index (CFI) since our 2020 goal is to have our CFI at 3.0 by 2020. As of June 30, 2015, our IPFW CFI is 2.99.

Prager, Sealy & Co., LLC, and KPMG LLP (one of my former employers) have worked with numerous higher education institutions and other public-sector organizations over many decades. Based on this work, and in conjunction and affiliation with the National Association of College and University Business Officers (NACUBO), they determined that there are several basic common attributes, or financial ratios, of successful higher education institutions. Accreditation organizations often require the reporting of these ratios as part of their ongoing review of higher education colleges and universities. As such, the Composite Financial Index is used by the Higher Learning Commission, and other accrediting bodies, as a measure of an institution's financial health. These attributes, forming a framework for strategic financial analysis, are applicable to all types of higher education institutions.

Four measures can provide insight into the financial health of a higher education institution:

- Primary Reserve Ratio
- Net Income Ratio
- Return on Net Assets Ratio
- Viability Ratio

From these four ratios, an overall financial measurement of an institution’s financial health can be determined. Using the four ratios it is possible to calculate the Composite Financial Index (CFI). The CFI is useful in understanding an institution's financial position and in assessing the future prospects of the
institution. A key feature of the CFI is that a single score allows weaknesses in individual ratios to be quantitatively offset by strengths in other ratios. The result is the ability to look at overall financial health, not just individual components of financial health, between institutions.

A CFI of at least 3 indicates that an institution is financially healthy in that approximately 140 days of annualized expenses are retained in expendable resources; the net income generated is sufficient to keep pace with, and will likely exceed the growth of, moderate expense levels; the return on net assets is reasonable for the overall investment activity of the institution; and expendable net assets exceed the institutional debt level.
<table>
<thead>
<tr>
<th>Elimination of inter-entity amounts</th>
<th>+ 0.0</th>
<th>0.0</th>
<th>0.0</th>
</tr>
</thead>
<tbody>
<tr>
<td>Denominator Total</td>
<td>150,117,836.0</td>
<td>152,434,061.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Net Operating Revenue Ratio = ÷</td>
<td>0.067</td>
<td>5.141</td>
<td>0.10</td>
</tr>
<tr>
<td>Return on Net Assets Ratio Calculation:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Change in net assets + C.U. change in net assets</td>
<td>10,031,946.0</td>
<td>383,431.0</td>
<td></td>
</tr>
<tr>
<td>Total net assets = C.U. total net assets (beginning of year)</td>
<td>143,324,379.0</td>
<td>142,940,948.0</td>
<td></td>
</tr>
<tr>
<td>Return on Net Assets Ratio = ÷</td>
<td>0.070</td>
<td>3.500</td>
<td>0.20</td>
</tr>
<tr>
<td>Viability Ratio Calculation:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Expendable net assets</td>
<td>Numerator</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total =</td>
<td>69,356,802.0</td>
<td>65,514,410.0</td>
<td></td>
</tr>
<tr>
<td>Institution long-term debt (total project related debt) +</td>
<td>122,738,442.0</td>
<td>126,928,679.0</td>
<td></td>
</tr>
<tr>
<td>C.U. long-term debt (total project related debt) +</td>
<td>0.0</td>
<td>0.0</td>
<td></td>
</tr>
<tr>
<td>Denominator Total =</td>
<td>122,738,442.0</td>
<td>1.355</td>
<td>126,928,679.0</td>
</tr>
<tr>
<td>Viability Ratio = ÷</td>
<td>0.565</td>
<td>0.35</td>
<td>0.47</td>
</tr>
</tbody>
</table>

**COMPOSITE FINANCIAL INDICATOR SCORE (CFI)**

2.99

1.61

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

No.

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

David Wesse
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 [IA.1](#) or [IA.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:
   Enhanced university-wide budgetary controls.

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>IV.B - Efficiency</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?

High

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

An appropriate budgetary process impacts the effectiveness of all aspects of the university.
9. If continuing your goal, what progress have you made or which action steps have been completed?

**Enhanced IPFW Budgeting Process**

As of July 1, 2014, to flatten the IPFW administrative organization, eliminate an administrative reporting level, streamline processes and allow for greater engagement, cost savings and efficiencies, the IPFW Comptroller area was restructured, with the Comptroller position being eliminated. The IPFW Bursar, Senior Business Manager, Accounting and Foundation Manager now report directly to Vice Chancellor for Financial and Administrative Affairs. Doing this simplified the organizational structure by eliminating a layer of management, increasing the number of direct reports, flattening and making for greater efficiency.

In conjunction with the above, to better reflect the importance of an enhanced budget process and to address the significant budgetary challenges facing IPFW, the existing Associate Comptroller position was converted to a Director of Budget and Planning position. This position reports directly to my Vice Chancellor for Financial and Administrative Affairs position. Doing this better reflected the importance of budget planning within the IPFW organizational structure.

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

Rationalizing and making the S&E budgeting process credible.

| 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?

Establishing a formula based S&E budgeting process in all academic units for FY 2016-2017.
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?
   To staff the existing Budget and Planning area.

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?

Additional resources are not required in this area.

<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 <strong>and</strong> 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>

**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?

Resistance to change and resistance from academic departments that currently receive an inordinate amount of S&E funding.
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.

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

TASK FORCE COMMENTS AND/OR QUESTIONS:

19. What is your timeline for accomplishing this goal?

1-2 years

Dates: Click here to enter text.

RUBRIC

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

<table>
<thead>
<tr>
<th>All performance measures include time frames.</th>
<th>Some of the performance measures include time frames.</th>
<th>No time frames are included with the performance measures.</th>
</tr>
</thead>
</table>

TASK FORCE COMMENTS AND/OR QUESTIONS:
Goal 2

1. Enter a unit goal:
   Enhanced information technology services.

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

3. If goal has been completed, what was the impact on your unit and Plan 2020?
   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:
   - [x] Create/Develop
   - [ ] Eliminate/Discontinue
   - [x] Improve/Enhance
   - [x] Increase Efficiency
   - [ ] Maintain
   - [ ] Stretch
   - [ ] Other: If ‘Other’, click here to explain.
6. How does your unit goal align with Plan 2020 Goals, Metrics & Outcomes?

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

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

High

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

Appropriate technology infrastructure and operation impacts all areas of the university.
9. If continuing your goal, what progress have you made or which action steps have been completed?

ITS:
- Completed implementation of Office 365 for Faculty and Staff, officially retiring GroupWise (July 2014-February 2015)
- Implemented self-service change/forgot password mechanism for all IPFW account holders (February 2015)
- Partnered with Campus Safety to implement Mastodon Card based door access for a select group of campus doors (February 2015)
- Completed a Banner Backup and Change Control Audit (May 2015)
- Large-scale infrastructure replacement in the ETCS building (all fiber optics, new Cat 6a cabling, new Cisco switch hardware, construction of new telecomm rooms on each floor) – work partially complete in FY15, finished in early FY16
- Built new XIO 230 SAN grid and retired eleven (11) older XIO ISE 1 data storage units
- Implemented project tracking lists in all four teams, 321 projects in FY15.
- Implemented a new network infrastructure service contract model that reduced cost while creating a hot-spare pool of network gear to allow for faster response in replacement of failed hardware
- Completed reorganization of ITS
- Implemented Alertus (desktop emergency notification as a complement to our existing RAVE product)
- Created a new Interior Design lab with high-performance, AutoCAD certified workstations
- Began the multi-year process of implementation of SCCM to replace Novell ZENworks
- Implemented a standard maintenance window of Saturday 10:00 p.m. to 2:00 a.m.
- Worked with Student Government to replace 15 loaner laptops in the Library
- Completed the Banner DBEU upgrade
- Completed the Banner ODS upgrade
- Retired / upgraded all Windows XP systems on campus (largely to address security needs)
- Completed Simplex Grinell project (card readers for door access)
- Neulion / Alvarado Ticket Scanning project begun in FY15 completed in early FY16
- Changed wireless SSID configurations and assisted users in reconfiguring devices
- Completed Oracle Upgrade – version 11.2.04
- Implemented Cognos upgraded (Reporting Database for Banner)
• Created Athletic Rewards Card Application (scan student cards for loyalty points program)
• Implemented Title IX load to Banner from Blackboard
• Implemented Library Patron Database, which allows students to use Mastodon Cards to checkout books
• Upgraded all Banner servers to Java 7
• Implemented Mobile Card Reader, allowing Student Affairs to scan Mastodon Cards with iPads
• Upgraded dotCMS web environment to 2.56
• Implemented Lync to Skype for business migration, distributed documentation & notifications to users
• Integrated Purdue’s WebCert software into IPFW’s HR training

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

   Ongoing management direction.

| 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?

   Connection speed, frequency of down time and help desk ticket information.
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?

Goal will be accomplished via reallocation of existing funds.

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

ITS related funds will be reallocated.

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

Other: Describe: Click here to enter text.

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

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

Additional funds are not needed.

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

Resistance to change and immensity and scope of the enhancements needed.
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**TASK FORCE COMMENTS AND/OR QUESTIONS:**

19. What is your timeline for accomplishing this goal?

3-5 years

Dates:  Click here to enter text.

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

1. Enter a unit goal:
   Cost reduction through efficiencies.

2. Status of goal:

   □ Completed   □ Eliminated   □ Modified   ☒ In Process   □ New

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

   Click here to enter text.

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

4. If eliminated or modified, state reason:

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

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

5. Type of goal:

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

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

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

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

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

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<td><strong>3rd Plan 2020 Goal</strong></td>
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<td>Choose an item.</td>
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</table>

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

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

Prior to my coming to Indiana University Purdue University Fort Wayne it experienced several years of declining enrollment and significant deficits. IPFW had a deficit of over $5 million at the time I arrived in June of 2014.

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

To address the financial situation I took the actions indicated below and, as a result of these actions IPFW finished Fiscal Year 2015 in the black.

- Since June 1, 2014, there were $2,204,183 in cuts or reallocations in the IPFW units that reported to me. Included in these cuts were twelve (12) positions that were eliminated or reduced, in the Vice Chancellor for Financial and Administrative Affairs areas. As a result of evaluation of functions within these units, a series of organizational adjustments were enacted by me in order to provide efficiencies, improve effectiveness and generate cost savings. These adjustments reflected changes in lines of reporting within divisions and re-alignment of position responsibilities.

- As part of a continuing effort to focus on IPFW’s institutional mission and meeting the challenges of its budgetary environment, the men’s and women’s Division 1 tennis teams were eliminated as of the 2014-15 athletic year. This provided $450,000 for reallocation and reinvestment in university programs focused on student success, retention, and recruitment. This action was part of an ongoing effort to realign IPFW resources toward the university’s primary mission. This decision was made on the recommendations of external consultants and an internal review. This action reflected a rebalancing of institutional priorities while remaining committed to NCAA Division 1 athletics. The goal was to provide the greatest benefit to support the overall institutional mission while making the least impact on student-athletes and staff members, in a challenging budgetary environment.
After much investigation and analysis, it was determined that it would be in the best interest of the university to continue to self-operate its Printing Services. The Printing Services supervisor retired. By eliminating this supervisory position, and combining Printing Services and Mail Services under one supervisor, plus outsourcing specialty printing, like envelopes, IPFW achieved savings and efficiencies without outsourcing.

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

Further cost reduction and efficiency efforts.

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

A balanced budget: Institution-wide revenues and expenses were balanced for the fiscal year ending June 30, 2014

An acceptable Composite Financial Indicator (CFI): An acceptable CFI of 2.99 was achieved for the fiscal year ending June 30, 2014. This demonstrates that IPFW is becoming a financially healthy institution. As of June 30, 2015, the university’s Composite Financial Index (CFI) was 2.99, up from 1.61 during the 2013-2014 fiscal year. The CFI reflects the combination of four ratios that look at reserves, income, and other statistics. The Higher Learning Commission and other accrediting bodies look for institutions to have a target CFI of 3.0. This was achieved by leadership that instituted a budget development and management process that is aligning available resources with goals and priorities of the institution.
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?

Various, depending on cuts.

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

Various, depending on cuts.

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.
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Other: Describe: Click here to enter text.

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

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

Additional resources are not needed.

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

Resistance to change and potential impact of cuts on staffing and operations.
### RUBRIC

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

### TASK FORCE COMMENTS AND/OR QUESTIONS:

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

3-5 years

Dates:  
[Click here to enter text.]

### RUBRIC

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

### TASK FORCE COMMENTS AND/OR QUESTIONS:
Goal 4

1. Enter a unit goal:

   Mobile app implementation.

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?

   Over the past summer our first official mobile app rolled out. In its first 90 days, the app was downloaded close to 3,000 times through the Apple App Store and Google Play. It is available for free to the general public and includes an interactive campus map, department phone numbers, and list of campus events. Students can sign into the app using their regular credentials to view their grades, register for courses, view holds on their account and pay their bills. The app also includes a special IPFW Marketplace tool for making donations, paying IPSGA rental fees, and more.

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

4. If eliminated or modified, state reason:

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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## TASK FORCE COMMENTS AND/OR QUESTIONS:

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

   Click here to choose.

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

   Click here to enter text.

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

   Click here to enter text.

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

   Click here to enter text.

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

   CUL - # of positions needed  [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.

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

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

Other: Describe:  Click here to enter text.

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

Click here to enter text.

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

Click here to enter text.
### RUBRIC

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

### TASK FORCE COMMENTS AND/OR QUESTIONS:

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

[Click here to choose.]

**Dates:** [Click here to enter text.]

### RUBRIC

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

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

1. Enter a unit goal:

   New university-wide dining services operation.

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?

   Outsourced IPFW’s dining services to Aramark. As part of this process a series of renovations were made to the IPFW campus dining that transformed the food service facilities from a few branded national chain options to concept-based dining featuring fresh, healthy food options. The renovations were a result of input gathered from visits, surveys and discussions with students, faculty, and staff as well as input from the IPFW Food Services Committee to create a modern and fresh dining experience. The food venues on campus were remodeled to provide a contemporary high quality space for gathering and dining. Multiple seating configurations are available for students, faculty, and staff. Food serving spaces were configured to accommodate a wide variety of food offerings and to allow options from full “home cooked meals” to “grab and go” sandwiches, salads, fruit, and beverages.

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

4. If eliminated or modified, state reason:

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

TASK FORCE COMMENTS AND/OR QUESTIONS:

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

   Click here to choose.

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

   Click here to enter text.

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

   Click here to enter text.

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

   Click here to enter text.

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

   CUL - # of positions needed  
   Benefited  

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

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

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

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

18. What challenges or constraints, other than financial (i.e. federal or state mandates, accreditations, university policy), might affect your progress toward accomplishing this unit goal?
Click here to enter text.
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**TASK FORCE COMMENTS AND/OR QUESTIONS:**

19. What is your timeline for accomplishing this goal?

   Click here to choose.

   Dates:  Click here to enter text.

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

1. Enter a unit goal:
   Rationalize handling of cash reserves.

2. Status of goal:
   - [ ] Completed
   - [x] In Process
   - [ ] Eliminated
   - [ ] Modified
   - [ ] 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
   - [x] Improve/Enhance
   - [x] Increase Efficiency
   - [ ] Maintain
   - [ ] Stretch
   - [ ] Other: If ‘Other’, click here to explain.
6. How does your unit goal align with Plan 2020 Goals, Metrics & Outcomes?

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

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

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

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

<table>
<thead>
<tr>
<th>1st Plan 2020 Goal</th>
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<th>Area II Goals</th>
<th>Area III Goals</th>
<th>Area IV Goals</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>IV.B - Efficiency</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?

High

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

The university cannot afford to have existing funds “dormant” or “orphaned”, sitting unused or under used. Deans, heads and directors know how much flexible funding they have
9. If continuing your goal, what progress have you made or which action steps have been completed?

- Of the more than 800 inactive accounts on the original report, over 600 have been cleared, an additional 30 have now had activity and just over 180 remain unchanged.

- Monthly reports are now being sent out centrally to the Business Managers to help manage both their general fund and cash accounts – in particular to review any negative balances and accounts that have shown no activity.

- A large number of the inactive accounts were in our Division of Continuing Studies (DCS) where they have historically requested 500-600 new course funds in both the fall and spring.

- As of January 2016, DCS will no longer be requesting new fund account numbers for their courses. They will instead use their current 22080000 fund.

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

- After review of the reported gift fund balances, it was found that over $77,000 remain due to obsolete/completed programs and projects. The Business Office is working with our Advancement office to see if these can be consolidated with other gift accounts or can be used for a similar purpose.

- We also found that a small number of gift accounts had a balance of less than $100. The departments have been made aware of these balances and will use them on the next appropriate purpose or will wait to hear the outcome of your discussion with Internal Audit on the possibility of consolidating these small balances into other departmental gift accounts.

- The Business Office has also started to work more closely with the Bursar office to put together a process that will help better maintain their outside award accounts.
- A cash balance report was shared with our financial aid office to make them aware of various inactive scholarship account balances. As a result of these discussions, the financial aid office documented some of the history and nuances of the various scholarships. This will help everyone get a better understanding of how/who/why a scholarship is awarded and how it has historically been funded (prior to this there was one individual at the university who knew this history).

- Limit carry forwards to 5% unless a written plan for carry forward use is prepared, submitted and approved.

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

   Reduction in the number of restricted accounts.

<table>
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<tr>
<th>RUBRIC</th>
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</thead>
<tbody>
<tr>
<td>Are clearly stated performance measures provided for each goal?</td>
<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?

   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?

Will use current funding to cover the cost of existing staff.

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

Click here to enter text.

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

Click here to enter text.

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

CUL - # of positions needed  
Benefited  Select Yes/No

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

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

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

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

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

Click here to enter text.

<table>
<thead>
<tr>
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<tbody>
<tr>
<td><strong>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.)</strong></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?

Resistance to change and perception that departments will be losing funds by restricting carry forwards.

<table>
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<td><strong>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.</strong></td>
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</tbody>
</table>

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

1-2 years

Dates:  Click here to enter text.

<table>
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<tbody>
<tr>
<td>Are time frames included for each performance measure (metric)?</td>
</tr>
</tbody>
</table>

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

1. Enter a unit goal:
   Online university calendar.

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

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

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

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

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

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

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

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

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</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>I.B - Student engagement</td>
<td>II.C - Community engagement</td>
<td>III.C - Cultural and artistic programming</td>
<td>IV.B - Efficiency</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>
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</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?

The IPFW communications study found that the need for a high quality online calendar was the highest communications priority of IPFW students. This online calendar will provide:

- A clean design, that is user-friendly and easy-to-navigate
- A unified presentation of all IPFW events
- A “browse by” feature
- Be displayable by day, week, month
- Categories (department, type, location, topic, tag, etc.)
- Autofill search and advanced search by category (Grand Valley State University)
- Map integration for wayfinding
- Workflow/event approval
- Social sharing and subscribing

Guiding Principles

- Pull forward best aspects of the former IU events calendar
- Offer one central location for all events taking place at IPFW
- Eliminate any redundant systems and efforts
- Responsively design for viewing on mobile or desktop
- Content is structured (using HTML5) for extension to other systems, websites, social media,
- and mobile environments
- Make calendar easy for users to view, browse, navigate, and search events
- Ensure design is intuitive and visually appealing
- Demonstrate—at a glance—that IPFW is a thriving community with a variety of activities that
- appeal to all
- Simplify the editing and publishing experience
- Integrate various systems including
- dotCMS

Calendar Features
- Search for events with auto-completion help
- Narrow searches by
- Event Type
- See Event Type listing
- Sub-calendars (carried over from the previous IU calendar system)
- Academic Calendar and Official Dates
- Alumni Events
- Arts and Entertainment
- Career and Professional Development
- Diversity and International Events
- Educational Activities
- Intercollegiate Athletics
- Off-campus Events
- Recreational Sports, Health, and Wellness
- Student Activities
- Technology Learning
- Department/Office
- Club/Organization
- Date Range
- Location
- Categories
- Audience Type
- View event detail
- See below
- Explore related events and content
- Locate events using geolocation services
- Allow users to share event information
- Receive notification reminders for upcoming events
- Learn about featured events
- Register/purchase tickets (if applicable)
- Event Detail Fields (Structured Content)
- Event Information
- Title
- Type
- See Event Type listing
- Description
- Public/Private
- Start Date/Time
- End Date/Time
9. If continuing your goal, what progress have you made or which action steps have been completed?

Large online calendar work team has been created. Vendor has been selected.
10. What action(s) does your unit plan to take to support this unit goal?

Ongoing management oversight.

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

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

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

Online calendar up and running appropriately.

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

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?

To cover the cost of the contractor who will install the contractor.
14. If you are reallocating your current resources to accomplish this goal, please explain what specific resources will be reallocated.

   ITS resources will be reallocated for this purpose.

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?

Ability to get the calendar up and running in a timely manner.

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

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

1. Enter a unit goal:
   Future operation of university bookstore.

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

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

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

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

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

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

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

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

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<tbody>
<tr>
<td></td>
<td>I.A - Student</td>
<td>II - Promote</td>
<td>III.A - Collaborations and research</td>
<td>IV.B - Efficiency</td>
</tr>
<tr>
<td></td>
<td>learning</td>
<td>knowledge</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| 2nd Plan 2020 Goal | Choose an item.    | Choose an item.    | Choose an item.    | Choose an item.    |

| 3rd Plan 2020 Goal | Choose an item.    | Choose an item.    | Choose an item.    | Choose an item.    |

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?

Due to the rapid changes in the university bookstore and textbook business, IPFW, Purdue Calumet and Purdue North Central have retained Campus Bookstore Consulting Corporation (CBC) to conduct an assessment of the bookstores. CBC is an independent, objective national bookstore consulting firm serving higher education. The three objectives assigned to CBC are:

- To provide an independent contract review and financial assessment of our bookstores
- To assess the current bookstore contract
- To determine the service requirements and bookstore/campus store needs of the universities.

As part of this process, CBC will be soliciting qualitative feedback from the campus community. CBC will conduct interviews/discussions with faculty, staff and administrators to get an indication of the perception of the bookstore on campus. At this point we are gathering requested data for CBC and expect to schedule on campus visits in the next month. The visit will be a combination of interviews with specific individuals or groups with similar issues plus an open session if time permits.

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

Outside consultant has been hired and scheduled to come to campus on February 2, 2016.

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

Ongoing management oversight.

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

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

The Bookstore contract expires in May 2017, An RFP will be issued and a determination will need to be made regarding our textbooks are provided, at IPFW, by this date.

| 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?

The cover existing staff and the cost for the consultant.

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?

Resistance to change and adequately communicating potential changes to students, faculty and staff.

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<thead>
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</table>

| TASK FORCE COMMENTS AND/OR QUESTIONS |

19. What is your timeline for accomplishing this goal?

1-2 years

Dates: Click here to enter text.

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

1. Enter a unit goal:

Funding and construction of IPFW Leadership Center.

2. Status of goal:

☐ Completed  ☐ Eliminated  ☐ Modified  ☒ In Process  ☐ New

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

Click here to enter text.

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

4. If eliminated or modified, state reason:

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

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

5. Type of goal:

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

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

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

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

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

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

High

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

IPFW Center for Leadership
In light of the legislature’s designation of IPFW as a multisystem metropolitan university it is requested that IPFW’s Center for Leadership be a priority project of the Purdue system. This priority designation will reflect the importance that the IPFW Center for Leadership will have to the university in promoting student success and in engaging the Fort Wayne community. In a very real sense IPFW’s Center for Leadership will be the physical manifestation of IPFW’s new metropolitan university designation. Purdue’s support of this priority project will demonstrate the system’s commitment to IPFW, Fort Wayne, Northeast Indiana and the legislature’s new designation.

The legislature’s designation of IPFW as a “Multisystem Metropolitan University” has prompted the IPFW Community Council, and others, to ask what the tangible benefits of this designation will be for the people who live in Fort Wayne.

This new multisystem metropolitan university designation is seen as a means for IPFW to offer an enhanced educational program focused on the needs of Fort Wayne – with the priority being essential market-driven training. The proposed IPFW Center for Leadership is seen to be closely addressing this need. It is linked to IPFW’s new designation and to the needs of Northeast Indiana.

The physical location of the Center for Leadership at IPFW will be highly visible to the Fort Wayne community, located at a campus site across from the Coliseum on highly traveled Coliseum Boulevard. This site and this project is one of the best ways to reflect and respond to IPFW’s new community-focused designation. As such we are specifically asking that this project be made the Purdue System top priority in the next round of capital outlay requests.

The 10-year IPFW capital outlay plan contains the following:

- Business School
- Hospitality Program
- Art Gallery

The new “IPFW Center for Leadership” Building will encompass the above three (3) projects in our capital plan:

Current Situation

The Doermer School of Business (DSB) is composed of three academic departments, Accounting and Finance, Economics, and Management and Marketing. Additionally the DSB offers the Masters in Business Administration Degree through both traditional and accelerated cohort-based curricula. Fall 2014 numbers are 1,020 undergraduate and 78 graduate students are pursuing programs of study offered by the 29 full time and 11 part time faculty of the School.

Offices 7,181 asf and one classroom 1,067 asf of the DSB occupy a portion of the third floor of Neff Hall (38.9% of the 21,195 floor total). The physical restrictions of this space, the geographic isolation, as well as the traditional and inflexible nature of available learning spaces negatively impact the School’s goal to be Northeast Indiana’s premier business program. Neff Hall is the second oldest building on campus (1972) and the lack of space has forced business classrooms to locate in various buildings with Kettler Hall being the primary location.

Responses to concerns or recommendations raised in AACSB sixth – year review addressed the recommendation for a new building stating that it “is essential in improving business education in the Northeast Indiana region.” This was also a topic of discussion in our previous review with the request that we have a plan in place. We would like to be in a position to delineate that plan.

Positive Outcomes to be achieved

- 21st Century learning spaces (Currently classrooms appear as they were when built. No labs)
- Intentional integration of formal and informal learning spaces (Totally lacking now)
- Modern physical facilities that are a source of pride for alumni and current students and are a strong attractor for future students
- A geographic setting that highlights the importance of DSB to the campus and community (A key to growth)
- The Center for Leadership is a natural fit with the DSB and will be especially beneficial to increasing enrollment in the MBA programs.
• Hospitality Management will provide the ability to be event driven and a community asset. This will provide a new level of community involvement that we have not enjoyed.
• Art Gallery will provide another level of community involvement with a segment of the population we have not been as closely associated with. Will allow Visual Arts to meet their accreditation requirements.

Competitive Regional Environment

We compete locally with Indiana Tech, St Francis, Trine who have recently completed or are in the process of completing building projects. Indiana Tech has added a series of new facilities and have taken a very old run down campus and made it a very attractive, modern university. St Francis is moving its business school to a downtown location and Trine is just completing its new business building.

Utilization of Vacated Space

Establishment of the Communication Sciences and Disorders Graduate Program, State of the Art Audiology Laboratories. In addition the programs already located on the third floor of Neff need space.

About:

• The Center will serve students, faculty and staff, and NE IN by providing a technology driven, collaborative learning environment designed to develop leadership competencies, leverage technology and improve leadership practice in business.
• Would house the AACSB accredited Doermer School of Business, Hospitality Management Program Education Center, Visual and Performing Arts Gallery, IPFW Center for Leadership
• Would include an outdoor leadership course
• Hospitality Management program would manage facility rentals for private and community events
• Café and gallery would be open to public
• Would serve as front door for businesses to engage with IPFW
• Close to Coliseum Blvd, the Landing, and Riverfront Development

Impact:

• Cultural Amenities – art gallery space
• Quality of Place – Integration of River Greenway with pathway
• Industry – Business partnership programs and implementation
• Education – Increase access to IPFW, internships, etc.
- Innovation and Technology – Integration of technology with business/education
- Talent Attraction – Strengthen the connection between education, business and place for new and continuing students to become permanent citizens of NE IN

It is requested that IPFW’s Center for Leadership be a priority project of the Regional Cities initiative. This priority designation will reflect the importance that the IPFW Center for Leadership will have in engaging the Fort Wayne community. In a very real sense IPFW’s Center for Leadership will be the physical manifestation of IPFW’s new metropolitan university designation. Regional Cities support of this project will demonstrate its commitment to IPFW, Fort Wayne and Northeast Indiana.

The physical location of the Center for Leadership at IPFW will be highly visible to the Fort Wayne community, located at a campus site across from the Coliseum on highly traveled Coliseum Boulevard. This site and this project is one of the best ways to reflect and respond to IPFW’s new community-focused designation.

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

Fund raising for this project has been initiated.

Project has been included in the capital outlay plan.

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

Make construction of this building a priority, get funding for its construction, and get it built.

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

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

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

The building is built, opened, occupied and operational.
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?

No

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

Click here to enter text.

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

Click here to enter text.

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

A preliminary schematic design budget has been done for the IPFW Center for Leadership. This includes furnishings, labor, materials and equipment to complete all general, mechanical and electrical construction on this project.
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:**

Projected costs:

- Building construction 28,963,000
- Furnishings and Fixtures 9,037,000
- Total Costs 38,000,000

This estimate will be ongoing and is being used for guidance purposes only. This estimate is based upon the following cost breakdown:

**IPFW Center for Leadership (108,000 SF + 13,000 Mech. Basement)**

- Site Construction (Lump Sum) $3,000,000
- Basement Construction (13,000 SF) 1,040,000
- General Circulation (18,000 SF) 3,820,500
- Multi-purpose/Living Room (11,000 SF) 2,334,750
- Business School (51,000 SF) 10,824,750
- Hospitality Program (19,000 SF) 4,032,750
- Leadership (1,000 SF) 212,250
- Art Museum (8,000 SF) 1,698,000
- Subtotal $26,963,000
- Contingency Allowance 2,000,000
- Total $28,963,000
- Additional Costs
- CM Fee $ 750,000
- Architectural & Engineering 1,700,000
- General Requirements (Reimbursable) 1,600,000
- Hospitality (Kitchen Equipment) 1,500,000
- Furnishings, IT, Audio Visual 3,487,000
- Total $9,037,000

Total Project Construction Cost $38,000,000

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?

Construction of this building.

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

Click here to enter text.
19. What is your timeline for accomplishing this goal?

3-5 years

Dates: The expected construction duration of this project is eighteen (18) to twenty (20) months after design and permitting.
New Goals for 2015-2016 - #5

1. Enter a unit goal:

   Compensation, classification and equity of faculty and staff.

2. Status of goal:

   ☐ Completed  ☐ Eliminated  ☐ Modified  ☒ In Process  ☒ New

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

   Click here to enter text.

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

4. If eliminated or modified, state reason:

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

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

5. Type of goal:

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

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

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

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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?

Compensation, classification and equity of faculty and staff has not been addressed at IPFW for many, many years. With our faculty and staff being our most important assets, it is key for us to take steps in these areas.

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

Preliminary review has occurred.

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

Address:

- Lack of Structure
- External competiveness
- Position in market
- Proposed regulations FLSA
- Compression

Internal equity review

External equity review

| 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?

CUPA data, Peer data,
### RUBRIC

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### TASK FORCE COMMENTS AND/OR QUESTIONS:

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

   No

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

   Click here to enter text.

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

   To be determined.

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

   Initiate analysis and review.

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

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

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

Other: Describe:  Click here to enter text.

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

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

Address Compensation, classification and equity of faculty and staff.

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

Click here to enter text.
### RUBRIC

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

### TASK FORCE COMMENTS AND/OR QUESTIONS:

19. What is your timeline for accomplishing this goal?

3-5 years

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: