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

Human Resources and Office of Institutional Equity strives to partner with and empower the IPFW campus community in support of the university’s mission of student success. We recognize that the people of our community—students, faculty, and staff—are our most important and valuable resources.

We therefore work tirelessly to make IPFW the employer of choice in the region, support integration of life and work experiences, and facilitate a diverse and inclusive campus, in addition to providing valuable knowledge, training, and resources to faculty and staff.

It is our mission to support the university, our students, and you.

We have five (5) key service areas designed to focus on supporting the mission of the university. Each area is focused on partnering, empowering and supporting the campus as a system and each of its parts i.e. staff, faculty, and students.

Below are the areas and brief descriptions of some of the services rendered that identify how we support the mission of the university. For without these services IPFW would not be able to effectively “drive the intellectual, social, economic, and cultural advancement of our students and our region” if the HR services were absent from the campus.

The five areas, in no certain order:

1. Payroll and Informatics
   a. Payroll
      i. Process human resources transactions in order to pay Indiana University and Purdue University faculty and staff the right amounts at the right time
      ii. Manage timekeeping system for IPFW campus
      iii. Consult with customers on pay issues
      iv. Support campus compliance with Purdue University and Indiana University personnel policies, and with applicable state and federal laws
   b. Reporting/Informatics
      i. Query human resources information sources and analyze data to provide information to campus decision makers
      ii. Maintain Human Resources website to provide current information of interest to IPFW customers
      iii. Work cooperatively with Vice Chancellors, Administrative Business Services, Accounting Services, and the Budget Office to develop and manage annual budget

2. Talent Acquisition
   a. Recruitment
i. Assure that employment law is being upheld and that equal opportunity and equal access is being ensured in every selection process for regular staff positions on campus
ii. Develop recruitment strategies
iii. Determine most effective advertisement placement to attract highly qualified individuals to IPFW
iv. Communicate Affirmative Action goals to support the university’s overall mission

b. Selection
i. Consult with leaders on recruitment strategies
ii. Initiate Exception to the Selection and Recruitment process
iii. Review applicants to determine qualified candidates and move forward in the process
iv. Search committee support
v. Recommend job related interview questions
vi. Behavioral based
vii. Ensure appropriate checks are completed
   1. Background
   2. MVR
   3. Drug testing
viii. Offer Letters
ix. Identify Nepotism situations and initiate appropriate documentation
x. Participate in Job Fairs on behalf of the university

c. Affirmative Action
d. Faculty Search support
e. Workforce planning

3. Total Rewards
   a. Benefits/Leaves/Wellness
   b. Classification and Compensation
c. Rewards and Recognition
   i. Employee Recognition
   ii. Staff Recognition Luncheon
   iii. RIPPLES
   iv. New Parents Program

4. Compliance and Title IX
   a. Legal services
   b. litigation management
c. public records request management
d. Special projects
e. Athletic Compliance
   i. Participation on the Compliance Committee
f. Safe Campus Compliance
   i. Sexual assault awareness - includes live training given to campus constituents; online training to new students, new employees, and mandatory reporters; and training coordinators, investigators, and panel members
ii. Sexual assault prevention - includes monitoring the campus climate through campus climate surveys and reviewing police reports for criminal activity, as well as monitoring trends in our region through partnerships with other campuses and community agencies

iii. Sexual assault response - includes providing interim measures, support services, and investigations according to state and federal law and Purdue policy

5. People, Learning and Development
   a. Coaching & Consulting
      i. Leader Consulting
      ii. Department Consulting
      iii. Strategic Planning
   b. Development
      i. Professional Development
      ii. Career Development and Coaching
      iii. Employee Skill Development
      iv. Succession Planning
      v. Leadership & Staff Processes
   c. Training
      i. Planning, Development & Delivery
      ii. Live (Face-to-Face)
      iii. On-Line
   d. Onboarding
      i. Leader Orientation
         1. Leadership Basic
         2. Leadership Bootcamp
      ii. New Employee Orientation
      iii. New Employee Tools & Templates
   e. Assessment
      i. Workforce Analysis
      ii. Organizational Analysis
      iii. Department Needs Analysis
2. Please list significant accomplishments from the last fiscal year not included in your goals.

During the six-month time frame that I have been directing both HR and OIE, here are some of the significant accomplishments that my team has shared with me:
- Piloted Electronic Performance Management System
- Initiated employee training to prepare for the implementation of university Neutral Conflict Resolution Program.

Please note, the department of Human Resources and Office of Institutional Equity is a new department and collectively this would be the first year to participate in providing goals and information in response to the university strategic plan. We already have some significant accomplishments just in the short time of the combined departments and feel confident that this will continue. At this time, we ask that this response not be weighted in the overall evaluation of HR/OIE.
3. What program-specific accreditations or federal & state laws impact what you do?

There are many employment laws that impact the work that we do on a daily basis. I will list them out by name, in addition, many of the HR/OIE co-workers hold a certification by the Society of Human Resources (SHRM) and other credible agencies distinguishing a level of expertise and knowledge. The department does not have an accrediting body for the field of HR/OIE but seeks to achieve organizational recognition such as Great Place to Work© or other models of recognition. Such recognition would impact IPFW greatly in regards to recruiting and retaining top talent. It would speak to the culture of the organization which impacts employees but also the student. Further, such designations would identify IPFW as a highly trusted organization as exhibited by the culture. Currently, since we do not hold such designations there will be a culture shift from trying to fix what is wrong to simply aspire to be great. Working to achieve a designation would allow us to compare ourselves to other institutions and also see what great institutions are doing to achieve such recognition in hopes of replicating best practices.

The impacting laws that provide constraints, guidance and provisions to act are as follows (keep in mind, willful and or unintentional violation of these laws could result in civil and or criminal penalties):

- ADA Amendments Act (ADAAA) 2008
- Affordable Care Act PPACA
- Age Discrimination in Employment Act (ADEA) 1967
- American Recovery & Reinvestment Act (ARRA) 2009
- American with Disabilities Act (ADA) 1990
- Civil Rights Act 1991
- Consolidated Omnibus Budget Reconciliation Act (COBRA) 1985
- Consumer Credit Protection Act 1968
- Copyright Act 1976 (Title 17)
- Drug-Free Schools and Communities Act
- Drug Free Workplace Act 1988
- Electronic Communications Privacy Act (ECPA) 1986
- Employee Commuting Flexibility Act 1996
- Employee Polygraph Protection Act 1988
- Employee Retirement Income Security Act (ERISA) 1974
- Employment-at-will Public Policy (EAW)
- Equal Employment Opportunity Act
- Equal Pay Act (EPA) 1963
- Executive Order 11246 (1965)
- Fair & Accurate Credit Transactions Act 2003 (FACT)
- Fair Credit Reporting Act 1970
- Fair Labor Standards Act (FLSA)
- Fair Minimum Wage Act 2007
- False Claims Act of 1863 (FCA)
- Family & Medical Leave Act (FMLA) 1993
- Genetic Information Nondiscrimination Act (GINA) 2008
- Health Information Technology for Economics & Clinic Health
- Health Insurance Portability & Accountability Act (HIPPA) 1996
- Homeland Security Act 2002
- Immigration & Nationality Act (INA) 1952
- Immigration Reform Control Act (IRCA) 1986
- Jobs for Veteran Act
- Lilly Ledbetter Fair Pay Act 2009
- Mental Health Parity Act (MHPA) 1996
- Needlestick Safety and Prevention Act
- Occupational Safety & Health (OSHA) 1970
- Older Worker's Benefit Protection Act OWBPA 1990
- Patient Protection & Affordable Care Act PPACA 2010
- Portal-to-Portal Act 1947
- Pregnancy Discrimination Act of 1978
- Retirement Equity Act (REA) 1984
Title VII Civil Rights Act 1964/1991 • Uniform Guidelines of Employee Selection Procedures (1978) • Worker Adjustment and Retraining Notification Act (WARN)


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

**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?

1. **Business Objective: Foster Student Success**
   a. A more diverse campus
   i. Exceed staff Affirmative Action Goals
ii. Meet faculty Affirmative Action Goals

KPI: This is an efficiency and quality key performance indicator.

Time to find required # of qualified candidates, selected from a qualified applicant pool \((yield\ ratio = \frac{\#\ of\ leads\ from\ recruitment\ method}{\#\ of\ qualified\ candidates\ invited\ to\ interview}) \times 100\%\)

Definitions:
- Qualified
  - Meet/exceed job qualifications according to the job description
  - Represents the Affirmative Action goals, where defined
- Qualified applicant pool
  - Represents the diversity aligned with the Affirmative Action goals for staff and faculty

Goals and Action Plan:
- Educate all hiring managers on Affirmative Action Goals by department and overall
- Ensure a qualified applicant pool, as defined above, is established through various recruiting methods and sources.

Leading indicators:
- # of qualified candidates in the qualified applicant pool

Lagging indicators:
- More diverse campus (not a real metric “more” however, with baseline demographics we can measure an increase in diversity but will also need to define diversity)

Note: Diverse should be defined by the organization. However, for my purposes the definition of diverse:
- Represents the Affirmative Action goals
- Mirrors the student body population
- Reflective of the community we serve
- Is inclusive

The data will be from fiscal year 2015/2016 (starting with Jan 2016).

2. Business Objective: Promote the creation, Integration, and application of knowledge
   a. 100% of all graduation students will have engaged in a high impact educational experience

KPI: This is an efficiency and quality key performance indicator.

Customer Interaction improvement % \((\#\ of\ onsite\ customer\ interactions\ by\ department/\#\ of\ ees) \times 100\%)\) compared to goal of customer interaction

Logic: The more we proactively (on site/in departments) interact (provide HR/OIE services) with our customers (staff, faculty and students when appropriate) the greater the ability for them to focus on the creation, integration and application of knowledge to produce a high impact educational experience for our students.

Goals and Action Plan:
- Round on all departments by end of 2015 - 2016 fiscal year.
- Increase the number of employees who use the Neutral Conflict Resolution program. The end of this fiscal year will be the base line utilization number. The next fiscal year 2016-2017 we should be able to indicate a specific % increase.
- Reduce the number of ER, OIE high level grievances/complaints. The thought is that if the above occurs then this # should go down because issues will be dealt with at the lowest level before something escalates.
5. Do you wish to provide any response to last year’s task force comments?
   No, the combined department did not exist.

6. Please list the names of the authors of this USAP report.
   Tamarah Brownlee MPH
   Director Human Resources and Office of Institutional Equity
Part II

**Instructions:** Report the status of goals created last year and add any new goals in order to have a minimum of three and no more than five “currently active” goals that you are working on. Currently active goals include goals from last year that you are still working on plus any new goals you are adding this year. Part 2 is pre-populated with last year’s goals along with space to report on up to five new goals. For example, if your unit had 8 goals last year, your report will come with space to report on up to 13 goals total (8 from last year + 5 potentially new goals). In the event that you have completed or eliminated last year’s goals you will add 3-5 entirely new goals, hence the space for five additional goals.

The task force determined that in the interest of aligning resources to strategic priorities, it is best to focus on 3-5 goals for each unit and that those goals should include a mix of maintenance and aspirational goals. Goals that were reported last year and are now completed or eliminated do not count in this number (although you will be asked to provide an update). We recognize that you may be required to eliminate goals from last year’s report simply to fit within the limit and it is up to units to decide which 3-5 they wish to focus and report on. Highly strategic units may very well have more than 5 goals they are working towards but the task force requests that you identify which of those are “active” for USAP-purposes. **Leave any unused goals blank.**

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

1. Enter a unit goal:
   
   Increase Diversity of the Workforce

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:  With the combined department the goal needs to be redeveloped.

   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>
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<td>Choose an item.</td>
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7. Is the unit goal a high, medium or low priority?

High

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

IPFW, including HR, is committed to employing a culturally diverse workforce. Having a workforce that is both reflective of the student body and community is most ideal in achieving organizational goals.
9. If continuing your goal, what progress have you made or which action steps have been completed?

Great progress has been made, as women employees have increased in number by 1.53% which is up 4.27% from five years ago. In addition, Minorities represent 17.01% of the total IPFW workforce. This is a 2.51% increase from the percentage last year with a more significant increase from five years ago (3.41% increase). (AAP FY2015/2016)

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

Here are some ways that we will support this goal. First, we will educate and train the hiring managers on campus to understand their Affirmative Action goals so they will have that information as they reflect on the diversity of the department they manage. The Talent Acquisition team will use diverse recruiting methods and multiple sourcing streams to identify diverse pools of talent. HR/OIE will partner with the Office of Multicultural Affairs and Dean of Students to plan programs to bring awareness and celebrate the diversity of the campus. We will also engage in using Social Media to help us in executing this goal as well.

| 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?

We will track completion of the Affirmative Action education and training for hiring managers. The KPI related a diverse campus has been articulated already in Section I,#4. We will also set a goal with Multicultural Affairs and Dean of Students on the number of programs to be delivered. Once established, that will be the objective.
12. Are you able to accomplish this unit goal with your current monetary and staffing resources?

Partial

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

Click here to enter text.

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

Click here to enter text.

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

We can source applicants from free mechanisms, we can use current resources to plan programs and we already have a Social Media presence that needs attention.

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  1

Benefited  Yes
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:  We are analyzing the various sources that would allow us to achieve our goal. Once this assessment has been completed we will have a clearer picture of the expense and if it is recurring or not.

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?

The additional resources would be used to secure multiple sourcing streams to identify diverse pools of talent. The OD Specialist would be responsible for education and training on the entire campus, not just diversity and Affirmative Action. Currently, this is absorbed by others which is not the most effective way to focus on education and training for an entire campus.
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?

A potential constraint would be having the education and training for the AA plan and other diversity topics fall on the three co-workers that are focused on other key priorities related to the primary functions of their jobs. Having someone be able to focus on all education and training development for the campus is the most ideal state because that individual can focus entirely on campus needs, and our specific training and development goals from the department for the university. Having this parsed out, diminishes the effect and ability for significant impact.

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)?_ |
| No time frames are included with the performance measures. |
| Some of the performance measures include time frames. |
| All performance measures include time frames. |
| **TASK FORCE COMMENTS AND/OR QUESTIONS:** |

---
Goal 2

1. Enter a unit goal:
   Develop a centrally coordinated performance management system that supports a culture of feedback and recognition.

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: This goal is multifaceted and requires a strategic approach that goes beyond developing a performance management system.

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

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

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

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

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

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<td>IV - Create a stronger university</td>
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7. Is the unit goal a high, medium or low priority?

High

8. Why is this goal important to your unit, the university or both?
When used effectively, performance management systems help drive strategy execution and fuels the bottom line. It is also an important catalyst for fostering employee engagement and growth. And, according to the McKinsey article “Building Capabilities for Performance,” (Benson-Armer, R., 2015), performance management is the biggest factor in driving overall organizational capability.


As we continue this journey to develop a high performing organization in hopes of becoming a stronger university, there are some basic fundamentals that should be focused on to help carry out the University mission and goals. We need a culture of learning that embraces the sharing of performance feedback, coaching for development and training where there are gaps. Having a performance management system alone is not the answer, there are behavioral changes that we must embrace in order to achieve success as a stronger university.

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

Click here to enter text.

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

The key actions that HR/OIE will take to support the goal is to identify and develop the tools and system to manage the coaching and feedback, develop and deliver education and training for supervisors and above as well as all other staff, measure and assess engagement and overall campus performance and further enhance the current recognition program.

| 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?

Online system and tools identified mid year 2016; number of co-workers trained on system and tools by end of 2016 - all leaders and all co-workers-(non-faculty), number of educational sessions delivered and number of co-workers attended, engagement baseline obtained, and increase in utilization of the recognition program by area.

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

Partial

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

Click here to enter text.

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

Click here to enter text.

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

Use the SAP system for tracking the feedback and coaching details and further enhance the current recognition program.
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    1
    Benefited    Yes

    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:   An engagement survey has a cost associated with it, however, we are yet researching the appropriate tool and resource that best fits the needs of the organization. Training for the HR team to deliver quality content.

    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?

    I would hire a dedicated OD Specialist to bring their expertise and knowledge to focus on all of the learning, development, and training needs of the campus. This would allow the other two HR Consultants the opportunity to focus on the HR strategic operations relegated to employee relations, Title IX, Affirmative Action, Recognition, New Parent Program, Neutral Conflict Resolution, onboarding, workforce analysis, coaching and consulting-- as a primary area of focus. They would be secondary support to the OD Specialist. I believe we can be much more impactful and experience a significant and realized return on this investment.
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.)

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

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

As indicated above, I have two people on the team who are able to design, develop and disseminate the education but their primary role has changed with the realignment in the HR/OIE department. They are working for the University in a more strategic way than before and will achieve greater outcomes from this change. I see this as a constraint but will work through any challenge with great optimism.

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.

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<td>Challenges are listed but they are not clearly stated.</td>
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<tr>
<td>Clearly stated challenges are included for this goal.</td>
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</table>

19. What is your timeline for accomplishing this goal?

1-2 years

Dates:  Click here to enter text.
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**TASK FORCE COMMENTS AND/OR QUESTIONS:**
Goal 3

1. Enter a unit goal:

   Develop and implement more efficient, electronic/paperless self-serve functions.

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: There are other key priorities that could impact the campus positively that are being considered at this time. Because this is important, we will work to better evaluate the current paper processes for improvements.

   **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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<td>Choose an item.</td>
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7. **Is the unit goal a high, medium or low priority?**

Click here to choose.

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

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

Click here to enter text.

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

Click here to enter text.

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

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

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

Click here to enter text.

| RUBRIC |
|-----------------|-----------------|-----------------|------------------|
| **Are clearly stated performance measures provided for each goal?** | The unit provided performance measures but they are not clearly stated. | Some of the stated performance measures are clearly stated. | All performance goals are clearly stated. |

(Performance measures are considered ‘clearly stated’ if a benchmark and quantitative measurement is included).

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

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

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

Click here to enter text.

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

Click here to enter text.

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

Click here to enter text.

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

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

Click here to enter amount.
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. |

| TASK FORCE COMMENTS AND/OR QUESTIONS: |

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

Click here to enter text.

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

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

Click here to choose.

Dates:  Click here to enter text.

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

1. Enter a unit goal:

Create a culture of wellness and healthy living by aligning and coordinating campus resources to deliver quality programming to drive healthy behavior changes, during fiscal year 2015/2016. This will create a baseline of information to use in developing a wellness strategy for the following fiscal year.

2. Status of goal:

☐ Completed    ☐ Eliminated    ☒ Modified    ☐ In Process    ☒ New

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

Click here to enter text.

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

4. If eliminated or modified, state reason:

☐ No funding for supplies and expenses    ☐ Priorities shifted
☐ No funding for salary & wages    ☐ Loss of staffing
☐ No funding for equipment / maintenance of equipment
☒ Other: The goal seemed to be incomplete and not specific or measurable. It has been modified to reflect those changes.

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

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

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

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

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

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

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

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<td>Choose an item.</td>
<td>IV - Create a stronger university</td>
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<tr>
<td>3rd Plan 2020 Goal</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
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</table>
7. Is the unit goal a high, medium or low priority?

High

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

Again, reflecting on the elements that create a great place to work and focusing in on the whole person will impact the University positively. When people are focused, healthy –mentally and physically they bring more of the best parts of themselves to work, productivity is higher and people are more engaged.

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?

We have already begun to coordinate services such as with EAP, Center for Healthy Living and HR benefits. We will educate the campus community on resources available and provide coordinated programming aimed at empowering the campus with resources and tools to healthy living.

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

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

Decrease in department absenteeism, increase in EAP utilization, increase in workout facility co-worker memberships, and increase in preventive care services.
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?

With exception to the support for education and training, EAP is contracted to develop and perform so many training engagements for our campus, the Benefits and Leaves Administrator’s and Center for Health Living are already resourced to focus on this initiative.

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

Click here to enter text.

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

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

CUL - # of positions needed  
Benefited  

S & W — Recurring  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:  

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

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

Click here to enter text.

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

Bringing three existing resources together in a coordinated fashion may present a constraint however, I am confident in the relationships that have been formed that each are already committed to a healthier, well campus that they will work together to achieve the highest outcome.

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<tr>
<td>Challenges are not included in the unit’s report.</td>
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**TASK FORCE COMMENTS AND/OR QUESTIONS:**

19. What is your timeline for accomplishing this goal?

1-2 years

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:
   Develop a Compensation philosophy that is adopted by the university and supports fair, equitable and competitive pay practices.

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

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

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

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

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

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

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

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---

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

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

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<td>IV - Create a stronger university</td>
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<tr>
<td>3rd Plan 2020 Goal</td>
<td>I.E - Signature programs</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
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</table>

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

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

This goal is important because IPFW, HR/OIE must be able to recruit and retain talent in order to deliver on any one of the USAP goals. If we are not able to recruit, retain and incentivize talent, by offering competitive wages while remaining in step with the defined market, IPFW will suffer to receive designation as employer of choice and the workforce would be more exposed to disengagement.

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?

A committee has already been formed to address a commonly accepted philosophy, pay practices are under review of this committee, job descriptions will be assessed for quality, we will engage with a consultant to address the larger more pervasive compensation issues.

| 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?

Completion of an equity survey and number of corrections, every job description reviewed by the leader annually, pay practice and philosophy used consistently in pay decisions.
12. Are you able to accomplish this unit goal with your current monetary and staffing resources?

Partial

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

Click here to enter text.

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

Click here to enter text.

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

Development and communication of a philosophy and pay practices, again education and training needed here (just as a note to demonstrate this is in everything we do).

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

   CUL - # of positions needed  Click here to enter text.

   Benefited  Select Yes/No
17. If you were to receive the additional resources outlined in question #16, how will they be used?

We will use the third party vendor to assess the most pervasive compensation needs.

| 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?

A potential constraint is the West Lafayette compensation structure. We are working directly with the leadership on that campus to stay connected to any University-wide developments. Currently, they are focusing on career streaming related to job structuring. We are entertaining this project for our campus for the described reasons above.

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

| TASK FORCE COMMENTS AND/OR QUESTIONS: |

19. What is your timeline for accomplishing this goal?

1-2 years

Dates: Click here to enter text.

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

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

1. Enter a unit goal:

   Click here to enter text.

2. Status of goal:

   □ Completed   □ Eliminated   □ Modified   □ In Process   □ New

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

   Click here to enter text.

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

4. If eliminated or modified, state reason:

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

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

5. Type of goal:

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

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

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

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

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

[Click here to choose.]

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

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

Click here to enter text.

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

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

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

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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.

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

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

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

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

Click here to enter text.

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<td>Goal has a clearly stated budget plan.</td>
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18. What challenges or constraints, other than financial (i.e. federal or state mandates, accreditations, university policy), might affect your progress toward accomplishing this unit goal?

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

Click here to choose.

Dates:  Click here to enter text.

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

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

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

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

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

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

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

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

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

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

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

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

[Click here to choose.]

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

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

Click here to enter text.

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

Click here to enter text.

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

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

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

Click here to enter text.

| RUBRIC |
|------------------|------------------|------------------|------------------|
| Are clearly stated performance measures provided for each goal? | 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  
   Non Recurring  

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

   S & E — Recurring  
   Non Recurring  

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

   Equipment — Recurring  
   Non Recurring  

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

   Other: Describe:  

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

Click here to enter text.

**RUBRIC**

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<th>Are clearly stated budget plans included for each goal?</th>
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**TASK FORCE COMMENTS AND/OR QUESTIONS:**

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

Click here to enter text.

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<th>Are clearly stated challenges identified for each goal?</th>
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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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| 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. |

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**TASK FORCE COMMENTS AND/OR QUESTIONS:**
New Goals for 2015-2016 - #4

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

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

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

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

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

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

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

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

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

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

Click here to choose.

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

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

Click here to enter text.

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

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

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

Click here to enter text.

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

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

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

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

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

CUL - # of positions needed

Benefited

S & W — Recurring

Non Recurring

S & E — Recurring

Non Recurring

Equipment — Recurring

Non Recurring

Other: Describe:

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

Click here to enter text.

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

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

Click here to choose.

Dates:  Click here to enter text.

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**TASK FORCE COMMENTS AND/OR QUESTIONS:**
New Goals for 2015-2016 - #5

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

2. Status of goal:

   ☐ Completed  ☐ Eliminated  ☐ Modified  ☐ In Process  ☐ New

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

   Click here to enter text.

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

4. If eliminated or modified, state reason:

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

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

5. Type of goal:

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

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

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

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

Click here to choose.

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

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

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

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

TASK FORCE COMMENTS AND/OR QUESTIONS:

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

Click here to enter text.

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

TASK FORCE COMMENTS AND/OR QUESTIONS:

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

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

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

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

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| 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.

| 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:**

______________________________

______________________________

______________________________