2015

University Strategic Alignment Process Report

Indiana University – Purdue University Fort Wayne

Library Services
Part I

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

The mission of the Walter E. Helmke Library is to:

1. Create a virtual and physical environment that supports the IPFW community in efforts to discover and access vital information.
2. Helmke Library provides high-quality information resources, expert information services, and innovative instruction fully integrated with the educational goals of IPFW.
3. As members of the IPFW community, we collaborate within and outside the university to increase information literacy and student success.
4. We value equity of access to and ethical use of information, respect for the privacy of library users, and intellectual freedom.
5. Helmke Library is dedicated to providing stewardship of the human record by collecting, describing, and organizing information.
6. Employing technology wisely, the library offers responsive delivery of resources, customized research consultation, and an environment that encourages independent exploration in the pursuit of academic excellence.

(Adopted by the Library Operations Council, June 22, 2005)

Helmke Library provides the resources, services and programs necessary to support IPFW’s mission to provide globally recognized baccalaureate and graduate programs that enhance the intellectual, social, economic, cultural advancement of our students, faculty, staff and region.
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.

**Library Goal:** Continue to enhance access to IPFW library’s resources and services.

**ACRL Standard 4:** Library enables users to discover information in all formats through effective use of technology and organization of knowledge.

**University Goals:** I. Foster Student Success and II. Promote the creation, integration and application of knowledge

- Implemented Express Search – Express Search is a discovery tool that enables users to search and find materials in the library catalog and many of the databases at the same time. It includes IUCAT, EBSCO databases like Academic Search Premier, and a number of other databases as well.
- Implemented new pro-active "pop-up" chat service on the library's home page. After several moments of inactivity, the site now invites users to ask for help using our chat service. Our interactions via chat more than tripled in September of 2014 compared to the previous year, and each month since then our chat service has been utilized at least 184% more than any previous year.
- Our library databases have included a "FIND IT" button for many years, allowing users to quickly and easily link to the full-text of documents they discover, but in 2015 we implemented an enhanced linking product that makes our FIND IT button easier to use and improves the chances of our students accessing material successfully.
- Implemented Browzine, an app for accessing academic journals, and Flipster, a platform for reading trade and popular journals.
- In 2014, IPFW librarians partnered to produce high-quality content for our Facebook page. Regular features now include an extremely popular “Throwback Thursday” series featuring photos from the library’s archives, a series of “Hints from Helmke” that advise users about library policies, collections, services, and spaces updates about
scholarly communication and our institutional repository, and videos that provoke wonder and stimulate conversation about scholarly topics and world events. The library’s Facebook page “likes” have grown from 108 to 554. Posts routinely reach between 40 and 300 people, often expanding to a reach of between 800 and 4000 during finals week and special events. Began building digital marketing channels, including Facebook, a rotating set of featured images on the library’s home page, and digital signage throughout the library. Graphics and messaging highlight library resources, services, news, and events.

- Updated and redesigned library website for easier access and intuitive navigation
- Provide End Note training to faculty, staff and students campus-wide
- Added a patron on-demand ebook collection
- Secured new laptops from ITS for student and faculty checkout
- Began using Digital Commons online faculty profile piece to create Web pages for accreditation visits and promotion and tenure documentation (Nursing)
- Offer Skype and Google Voice reference services

Library Goal: Library administration invests more resources in staff development and training and encourages, supports and recognizes excellence.

University Goal: Create a Stronger University through improving the support of stakeholders and the quality and efficiency of the organization

- Planned and implemented one-day retreat for Library staff
- Training provided for staff on dealing with difficult patrons and emergency/crisis preparedness and response
- Increased travel fund allocation for librarians and staff and increased budget for Supplementary travel grants to $4,000 in 2014-2015
- Provided grant for librarian to attend Association of Research Libraries institute on using Google Analytics effectively
- Provided grant for librarian to attend three-day training on Digital Commons platform for institutional repository
- Provided a library research leave grant to one librarian
- Developed a Peer Review of Teaching policy and procedure to mentor librarians and improve teaching skills
- Administration nominates and encourages staff and librarians for awards and Honors (Pride Plus Award, American Library Association Emerging Leader, 2015), campus-wide committees (USAP, UBC), and professional appointments (Academic Libraries of Indiana Scholarly Communication Committee)
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?

   a. The library is a federal depository for the third congressional district. This requires that the library follow the policies and procedures set forth in the United States Code, Title 44. As a federal depository library designated to serve the information needs of the third congressional district we are required to be open to the public, provide access to electronic, print, and any other document format that the government may issue. We must accommodate access to those formats and assistance in their use.

   The IPFW federal depository library was formally evaluated this year by the U.S. Government Printing Office (GPO). In their executive summary they “found that this Federal depository library is in full compliance of its responsibilities to provide access to and services for Federal depository library resources as required by 44 U.S.C. 19 and the Legal Requirements and Program Regulations of the Federal Depository Library Program” and that “Overall the library is a strong, service-oriented depository”

   b. Although not mandated, the Association of College and Research Libraries (ACRL) issues Standards for Libraries in Higher Education by which academic libraries can be evaluated and compared with peer institutions. For its first academic program review (2012-2013), the library conducted a comprehensive analysis of its resources, services, and programs within the framework of the Association of College and Research Libraries” (ACRL) Standards for Libraries in Higher Education (2011) and uses it as a guide for quality and comparison with other academic libraries.
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?

Library Metrics for Assessment of Goals and Outcomes

The library maintains a number of statistics, most required by the Association of College and Research Libraries (ACRL). These are compiled and released annually by ACRL. One of the library’s first-year USAP goals is to develop a measurement and metrics plan that demonstrates the library’s impact on the university’s primary academic mission, goals, and objectives. Our first step has been to identify a set of appropriate quantitative and qualitative performance metrics.

The chart documents the library’s work to date in determining relevant metrics and assessment of the library’s impact on student academic success and the value of library services and resources to the educational mission of the university.

<table>
<thead>
<tr>
<th>Major Library Focus Areas with Targeted ACRL Performance Indicators</th>
<th>Currently Available Input and Output Data</th>
<th>2014-2015 data</th>
</tr>
</thead>
</table>
| Library Services | • # of transactions and consultations by medium (in-person, chat, email, phone), patron type and status | Medium
In-person – 2,321
Chat – 591
Email – 444 |
<table>
<thead>
<tr>
<th>Library personnel provide regular information literacy instruction in a variety of contexts and employ multiple learning platforms and pedagogies</th>
<th># presentations; # of attendees</th>
<th>Presentations – 148 Attendees – 3363</th>
</tr>
</thead>
<tbody>
<tr>
<td>Library personnel collaborate with faculty and others to embed information literacy learning outcomes into curricula, courses and assignments</td>
<td>• Mapped Statewide Transfer General Education Core, <a href="http://www.in.gov/che/">http://www.in.gov/che/</a> Gen Ed IL outcomes to IPFW Gen Ed courses with IL outcomes • Implemented online modules for teaching basic IL concepts for use by W131 &amp; W233 instructors with pre- and post-test options</td>
<td>• Map completed; used data for information literacy modules and targeted classes • 5 modules created; 294 views</td>
</tr>
<tr>
<td>Library develops online resource guides (Libguides) to provide guidance and multiple points of entry to information</td>
<td>• # of Libguides, # of views • # online tutorials; # of views</td>
<td>• LibGuides – 243 Views – 87,700 • Online tutorials – 8 Views – 2621</td>
</tr>
<tr>
<td>Library integrates library resource access into institutional website and other information portals</td>
<td>• Usage of library website using Google Analytics</td>
<td>Views – 245,448</td>
</tr>
</tbody>
</table>
| Print and Digital Collections | Library provides access to collections aligned with areas of curricular foci, research, and institutional strengths | • # and use of print books, ebooks\(^1\), serial titles, databases, media | • Print book
Number – 152,130
Use – 39,700

• Ebooks
Number – 1237
Uses – 124,684

• Serial titles
Number – 9291
Uses – 66,878

• Databases
Number – 231
Uses – 2,140,000+

• Media
Number – 7972
Uses\(^3\) |

• Survey of faculty and students for Library Academic Program Review, 2013
• Requests for funding for new library resources during budget cycle now based upon needs identified through department:
  • Program Reviews
  • Curriculum Reviews (undergrad & grad)
  • Accreditation requirements

• Checkouts – 12,813;
  Renewals – 24,397;
  Ebook usage\(^1\) – 124,684

• Website views – 245,448 |

| Library organizes information for effective discovery and access | • # checkouts, renewals, ebook usage
• Usage of library website using Google Analytics | • 25+ shared database contracts |

| Library partners with multiple libraries (e.g., via collections consortia) for greater cost-effectiveness and to expand access to collections. | • Shared contracts through IU, Purdue, Academic Libraries of Indiana and MidWest Collaborative for Library Services
• # document delivery items borrowed and lent | • DDS borrowed – 8,268 DDS lent – 8,134 |

| The library builds and ensures access to unique materials, including digital collections | • # of items in and downloads from mDON, IPFW’s digital library collections |

| Library educates users on issues surrounding intellectual property rights and advocates for policies and programs that balance between the interests of | • # of items in Opus
• # of downloads
• # of new collections in Opus
• Google Analytics reports on use by domain, social media, etc. | • Items – 10,044
  Downloads – 63,088
  Downloads by department, faculty or student available on request |
<table>
<thead>
<tr>
<th>information users and rights holders</th>
<th>available at <a href="http://opus.ipfw.edu/opus_reports">http://opus.ipfw.edu/opus_reports</a></th>
<th>New collections – 13</th>
</tr>
</thead>
<tbody>
<tr>
<td>The library has the infrastructure to collect, organize, provide access to, disseminate, and preserve Digital-Only University Archives collection</td>
<td>• Funding received for personnel, software, hardware to begin development of IPFW Digital-Only University Archive &lt;br&gt;• Progress in establishing process, software, and adding items to Digital-Only University Archives</td>
<td>• Base funding achieved &lt;br&gt;• Implementing, no data available to date</td>
</tr>
</tbody>
</table>

### Facilities and Equipment

| The library provides clean, inviting, safe and secure facility conducive to study and research with suitable environmental conditions and convenient hours for its services, personnel, resources and collections. | • Gate counts <br>• # of hours open for services | Gate count – 405,247 <br>Hours <br>90 academic year <br>53 summer |
| Library’s physical space features connectivity and up-to-date, adequate, well-maintained equipment and furnishings needed for study and research | • # and type of equipment available for checkout; laptops & iPads <br>• # of checkouts of equipment available<sup>4</sup> | # of laptops – 16 <br>Laptop checkouts – 1319 <br># of iPads – 10 <br>iPads checkouts – 396 |
| Library uses physical and virtual spaces as intellectual commons, providing access to programs, exhibits, lectures and more | # of events, participants, educational purpose of the event | Events – 15 <br>Participants – 900+ <br>All events required to align with IPFW Baccalaureate Framework |
| Library provides intuitive navigation that supports self-sufficient use of virtual and physical spaces | • Online calendaring system for appointments <br>• Pop-up Chats | • Appointments – 532 <br>• Pop-up chats – 346 |

### Student/Faculty Engagement External Relations

<p>| Library engages in collaborations both on campus and across institutional boundaries to provide outreach to students | • Collaboration Index – developed by IPFW librarians to track and measure library outreach and partnerships. Records program, activity, # students, faculty administrators, community, audience, and contact hours &lt;br&gt;• Student employment in Library/Learning Commons &lt;br&gt;• Learning Commons partnerships | Programs – 54 &lt;br&gt;Total attendees – 2500+ &lt;br&gt;Total contact hours – 290+ &lt;br&gt;Student employees – 9 &lt;br&gt;Partnerships – CASA, ITS, and Honors |
| Library personnel collaborate | • Collaboration Index (e.g. CELT) | • 54 total events |</p>
<table>
<thead>
<tr>
<th>with campus partners to provide opportunities for faculty professional development</th>
<th>workshops, P &amp; T workshops, new faculty orientation, Library workshops on publishing, copyright, open access, etc.</th>
<th>• Evaluations from instruction sessions</th>
</tr>
</thead>
</table>
| Library personnel engage in their role as ambassadors in order to expand user awareness of resources, services, and expertise | • Librarians active on campus committees and in campus academic events  
• Collaboration Index | • Terms vary, but each librarian serves on at least one university committee  
• 54 total events |
| Library contributes to external relations through communications, publications, events, and donor cultivation and stewardship | • Collaboration Index  
• Library Marketing Committee activities  
• *Helmke Highlights* newsletter  
• Library services and collections open to the public | • 54 total events  
• Marketing Committee – communiques to campus outlets  
• Helmke Highlights – 10 issues/academic year |

*A 6-point scale tool for recording qualitative statistics about the intellectual effort, knowledge, teaching method used during each one-on-one instruction.*

1. Usage of ebooks is not possible yet through IUCAT, numbers from EBSCO only

2. Due to library renovation, facilities performance indicators will not be available for 2016

3. Catalog does not distinguish between media and print book checkouts

4. Checkouts is a yearly average of years 2011-2014

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

Last year’s comments emphasized the need for the library to write more specific goals and develop better metrics. One of the library's primary goals is to develop such metrics. We have begun the process as you will see in this report.

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

Library Management Team and feedback from staff and librarians
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:

Integrate information literacy competencies as defined by Indiana General Education Core Competencies and the Association of College and Research Libraries standards:  
   a. into the appropriate Gen Ed and writing and research courses in the major and capstone courses; and 
   b. into venues outside the classroom, especially in the virtual environment students work and play.

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>Area I Goals</th>
<th>Area II Goals</th>
<th>Area III Goals</th>
<th>Area IV Goals</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Plan 2020 Goal</td>
<td>I.A.1</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
</tr>
<tr>
<td>2nd Plan 2020 Goal</td>
<td>I.A.2</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
</tr>
<tr>
<td>3rd Plan 2020 Goal</td>
<td>I.M.1</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?

   Information literacy is addressed in the IPFW Baccalaureate Framework and is a required learning outcome for both categories of the Indiana General Education Core.

   The librarians work to reach students in key classes in all disciplines and to scaffold their information literacy learning but because IPFW does not have a required information literacy course, it is difficult to reach all students in the classroom. Concurrently, we work to incorporate information literacy as part of all IPFW services and programs to reach students outside the classroom.

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

   **Actions:**

   **Identify Information Literacy target courses in the disciplines**

   a. Target at least one 100-200 level writing/research course and at least the capstone or other 300-400-level research courses and work towards “scaffolding” IL instruction
   b. Work with faculty to provide classroom instruction and/or support related to Association of College and Research Libraries information literacy competencies

   **Progress:** Librarians continuing to increase classroom instruction and to augment with online tools such as guides and tutorials; have adopted AAC&U IL rubric and scaffolding tools to guide departmental work; individual librarians have recorded progress in integrating IL competencies in program curricula, such as librarian permanent member of DSB Undergraduate Curriculum Committee and role in developing new Business Communication course to debut fall 2016; librarian co-instructor in required Informatics course, and creator of required online modules for students entering the nursing master’s program; librarian part of redesign of Biology Department senior capstone curriculum and inclusion in new orientation class required for all students admitted to the Biological Sciences program; and required presence in new Psychology 140 course for majors.

   **Identify opportunities to reach student groups outside the classroom**
a. Identify opportunities to reach students, e.g. high-risk, returning, international, online, Collegiate Connection students, outside the classroom with instruction and targeted outreach

**Progress:** as documented in Collaboration Index, contacts outside classroom increasing, e.g. Information Fairs, GTA Orientations, International Student orientations, New Student Orientation, regular column in DCS online newsletter - Online Learning, 3MT Thesis, Student Research and Creative Endeavor Poster Symposium, Being First, Ladder Up (Military Student Services program), etc.

**Develop and Implement**

a. Reliable, current and scale-able teaching/learning/ instructional materials; continuous review of teaching/learning guides (website, LibGuides, tutorials, library tour, library assignments, factsheet/handouts, ‘lesson plans’ for librarian instructors)

b. Analyze results reported by faculty and students from Fall 2014 pilot test of information literacy modules in selected Gen Ed courses and refine modules and quiz

c. Appropriate feedback and assessment instruments

d. Identify and leverage campus data (e.g. MapWorks, ACRL NSSE modules to identify needs and target groups

**Progress:** Developed five online IL learning modules for use by faculty in W131 and W233 intended to provide tailored instruction to students while also producing evidence of student learning to meet General Education requirements. These modules were beta-tested in the fall of 2014 and revised and improved based on findings from the beta test; discussions begun on streamlining and repackaging of IL goals and materials; discussions begun re campus data instruments

**Assessment and Continuous Improvement**

a. Use assessment of learning by students, student and faculty evaluation of instruction and library services and programs, evaluation of teaching by librarian peers for continuous improvement and continuing education of all participants in tiered reference model

b. Refine and adapt application of assessment rubrics

**Progress:** Discussion with Assessment Director on opportunities and guidance; adoption of AAC&U Information Literacy rubric; liaison librarians added evaluation component to their classroom IL instruction; instituted peer review of teaching for librarians
10. What action(s) does your unit plan to take to support this unit goal?

**2015-2016**

**Actions:**

**Identify information literacy target courses in the disciplines**

a. Target at least one 100-200 level writing/research course and at least the capstone or other 300-400 level research course. Work toward scaffolding IL instruction

b. Work with faculty to provide classroom instruction and/or support related to ACRL information literacy competencies

**Projected:** increasing classroom instruction through liaison work; refine and update online tools such as Guides and tutorials; implement and expand pop-ins for large, introductory lower level courses to include Communication and evaluate impact; continue work with AAC&U IL rubric and scaffolding tools; data gathering on librarian activities to chart needs and progress

**Identify opportunities to reach student groups outside the classroom**

a. Identify opportunities to reach students. e.g. high-risk, returning, international, online, Collegiate Connection students outside the classroom with instruction and targeted outreach

**Projected:** continuing networking and integration with campus extra-classroom services and programs; pilot use of Community software to track student use and tie to GPA.

**Develop and implement:**

a. Reliable, current, scalable teaching/learning/instructional materials; continuous review of teaching/learning guides (website, LibGuides, tutorials, library tour, library assignments, factsheet/handouts, ‘lesson plans’ for librarian instructors

b. Analyze results reported by faculty and students from fall 2014 pilot test of information literacy modules in selected Gen Ed courses and refine modules and quiz

c. Appropriate feedback and assessment instruments

d. Identify and leverage campus data (e.g. ACRL NSSE modules) to identify needs and target groups

**Projected:** dissemination of streamlined and repackaged IL goals and materials to faculty; integration of library re campus data instruments and metrics

**Assessment and Continuous Improvement**
a. Use assessment of learning by students, student and faculty evaluation of instruction and library services and programs, evaluation of teaching by librarians peers for continuous improvement and continuing education of all participants in tiered reference model

b. Refine and adapt application of assessment rubrics

**Projected:** integration of AAC&U Information Literacy rubric to guide departmental work; data gathering on librarian activities to chart needs and progress

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

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

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

See Library Metrics in Part One #4 for benchmark data from 2014-2015. Input and Output Data and Expected Outcomes measures remain the same for 2015-2016: a combination of transactional tracking, Google analytics, and analysis such as mapping to demonstrate similarities to campus initiatives (e.g. Gen Ed learning outcomes). Investigate Banner and Community software as method of capturing student data to make correlative assumptions re academic success and use of library services and resources. Plan is to pilot test Community software in 2015-2016.

<table>
<thead>
<tr>
<th>RUBRIC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Are clearly stated performance measures provided for each goal? (Performance measures are considered ‘clearly stated’ if a benchmark and quantitative measurement is included).</td>
</tr>
<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?
   Current staffing levels of librarians and Information Assistants are crucial to providing services; current library budget has been able to accommodate software, data tools or professional education.

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

Click here to enter text.

---

**RUBRIC**

<table>
<thead>
<tr>
<th>Are clearly stated budget plans included for each goal? (A budget plan is considered ‘clearly stated’ if it includes an amount and the funding source.)</th>
<th>No budget information is provided.</th>
<th>Budget plan is included but is not clearly stated.</th>
<th>Goal has a clearly stated budget plan.</th>
</tr>
</thead>
</table>

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

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

Faculty receptivity; curriculum demands may increase or decrease faculty classroom “discretionary” time
**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:**
Goal 2

1. Enter a unit goal:

   Develop a measurement and metrics plan that demonstrates the library's impact on the university's primary academic mission, goals, and objectives

2. Status of goal:

   □ Completed   □ Eliminated   □ Modified   ☒ In Process   □ New

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

   Click here to enter text.

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

4. If eliminated or modified, state reason:

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

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

5. Type of goal:

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

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

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

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

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

<table>
<thead>
<tr>
<th>1st Plan 2020 Goal</th>
<th>Area I Goals</th>
<th>Area II Goals</th>
<th>Area III Goals</th>
<th>Area IV Goals</th>
</tr>
</thead>
<tbody>
<tr>
<td>I.A - Student learning</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td></td>
</tr>
<tr>
<td>2nd Plan 2020 Goal</td>
<td>I.M.1</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
</tr>
<tr>
<td>3rd Plan 2020 Goal</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>IV.A - Measurement and metrics</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 library’s primary mission is to promote the academic success of IPFW’s students and faculty. The metrics and assessment plan will help us evaluate the effectiveness of our services and programs in improving student learning, supporting student and faculty research, and increasing retention and graduation rates.

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

1. Identify and establish a set of appropriate quantitative and qualitative performance metrics

The library has developed a metrics rubric for assessing its goals and outcomes. The rubric identifies library focus areas, targeted performance indicators, currently available input and output data, proposed future measures, and expected outcomes.

2. Determine effectiveness of metrics in evaluating effectiveness of library services, resources and programs, establishing priorities for resource allocation, and setting future goals and action plans.

We are using currently available input and output data for reporting metrics and outcomes for the 2014-2015 academic year.

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

1. Identify additional measures needed to fill gaps in ability to evaluate effectiveness of library services, programs and resources in accomplishing expected outcomes.

   a. Library has identified some proposed new measures to be collected during the 2015-2016 academic year.

   b. Library is exploring use of TutorTrac or Community software platforms to link student use of library services and programs to student GPA and retention. Community software is being piloted, but it will require more resources to pilot TutorTrac.

| 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?

1. Library metrics plan has been developed and submitted to VCAA and will be used for 2014-2015 USAP report benchmark data and Library 2016-2017 budget request.

2. Proposed additional measures will be brought online as identified, evaluated, and approved and will be added to upcoming annual USAP and budget request.

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

We will begin by using data collected through the tools, software and expertise available to us.

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:  We have not selected a software yet, but are looking at Community and TutorTrac, both available on-campus. Software is not expensive, but current personnel available to manage TutorTrac is not sufficient if more participants/units are added. Requires reallocation of current resources or new resources.

Cost of including Topical Module:  Experiences with Information Literacy as part of next NSSE survey depends upon action by Assessment Office.

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?

Use additional personnel time and expertise to customize TutorTrac for library purposes and to manage back-end function of TutorTrac to provide GPA data for students who have used library services.

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

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

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

Inclusion of Topical Module: Experiences with Information Literacy as part of next NSSE survey depends upon action by Assessment Office.

<table>
<thead>
<tr>
<th>RUBRIC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Are clearly stated challenges identified for each goal? (A challenge is ‘clearly stated’ if it is explained in detail along with a contingency plan to overcome the challenge). May not pertain to each goal.</td>
</tr>
</tbody>
</table>

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

1-2 years

Dates: Metrics plan including proposed new measures should be in place within two years, but evaluation of the effectiveness of the data being collected will be ongoing.

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

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

1. Enter a unit goal:

Promote the creation, integration, and application of knowledge

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: As pointed out in last year’s USAP report evaluation, this goal was too broad and needed to be broken into more specific goals related to the library. Two new goals have been created to replace this goal.

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

5. Type of goal:

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

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

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

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

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

<table>
<thead>
<tr>
<th></th>
<th>Area I Goals</th>
<th>Area II Goals</th>
<th>Area III Goals</th>
<th>Area IV Goals</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Plan 2020 Goal</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
</tr>
<tr>
<td>2nd Plan 2020 Goal</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
</tr>
<tr>
<td>3rd Plan 2020 Goal</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
</tr>
</tbody>
</table>

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

Click here to choose.

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

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

Click here to enter text.

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

Click here to enter text.

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

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

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

Click here to enter text.

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

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

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

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

Click here to enter text.

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

Click here to enter text.

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

Click here to enter text.

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

CUL - # of positions needed  Click here to enter text.
Benefited  Select Yes/No

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

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

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

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

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

Click here to enter text.

<table>
<thead>
<tr>
<th>RUBRIC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Are clearly stated budget plans included for each goal? (A budget plan is considered ‘clearly stated’ if it includes an amount and the funding source.)</td>
</tr>
<tr>
<td>No budget information is provided.</td>
</tr>
<tr>
<td>Budget plan is included but is not clearly stated.</td>
</tr>
<tr>
<td>Goal has a clearly stated budget plan.</td>
</tr>
</tbody>
</table>

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

Click here to enter text.

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

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

Click here to choose.

Dates:  Click here to enter text.

| 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:

   Develop a future-directed, multi-year general fund budget process based upon review and analysis of established metrics and academic program needs

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?

   The OAA has established a reasonable framework for unit general fund budget requests. 1. The library’s materials budget request is based upon use measurements, academic program additions, expansions and elimination, and market forces. This report is now used by the VCAA in determining materials budget increases. The new materials budget analysis and budget request in the last two years has resulted in recurring increases that are directly related to Plan 2020 Goals to foster student success and promote the creation, integration and application of knowledge. It provides the stability and responsiveness to undergraduate, graduate and faculty program needs on a recurring bases. 2. OAA Memorandum 15-3, Guidelines for Faculty Position Requests, has instituted a standard procedure and timeline for requesting faculty/librarian positions which is transparent and tied to university goals. 3. VCAA is working on rebalancing S & E to cover general operating costs.

   Budget request process in academic affairs is rational and transparent and budget allocation is now based on analysis and prioritization of needs of the university. While the budget process will continue to evolve, at least for now, I do not see the need for an ongoing goal to “fix” the budget request and allocation system.

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

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

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

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

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

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

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

Click here to enter text.

| 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. |

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

Click here to choose.

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

Click here to enter text.

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

Click here to enter text.

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

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

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

   Benefited  Select Yes/No

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

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

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

   Other: Describe:  Click here to enter text.

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

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

   Click here to enter text.

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

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

Click here to enter text.

### RUBRIC

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

### TASK FORCE COMMENTS AND/OR QUESTIONS:

19. What is your timeline for accomplishing this goal?

Click here to choose.

Dates: Click here to enter text.

### RUBRIC

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

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

1. Enter a unit goal:

   Develop and implement plan to provide library services, resources and programs during major library renovation scheduled for December 2015-December 2016, and to work with architectural firm to design the best facility possible to meet the learning and teaching needs of students and faculty with the dollars available.

2. Status of goal:

   - Completed
   - Eliminated
   - Modified
   - In Process
   - New

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

   Click here to enter text.

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

4. If eliminated or modified, state reason:

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

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

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

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

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

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

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

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

<table>
<thead>
<tr>
<th>1st Plan 2020 Goal</th>
<th>Area I Goals</th>
<th>Area II Goals</th>
<th>Area III Goals</th>
<th>Area IV Goals</th>
</tr>
</thead>
<tbody>
<tr>
<td>I - Foster student success</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td></td>
</tr>
</tbody>
</table>

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

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

High

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

Library services, resources and programs are an essential part of student and faculty academic success. The library renovation is necessary to bring it into the 21st century, but at the same time we must continue to provide excellent services to those matriculating, teaching, and researching during this year of renovation. Our challenge is to make access to services, resources, and programs seamless and effective.

While the engineering plans for the building renovation are complete, the final selection of furniture and equipment is still to be done and has a significant impact on establishing an environment conducive to inquiry, discovery, group study, individual study, and quiet reflection.

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

1. Work with library staff, Learning Commons partners, faculty and students to design a facility equipped for 21st century teaching and learning with the dollars available.

   a. Completed library engineering and architectural plans with input from library, Learning Commons Council, Senate Library Subcommittee, IPSGA, etc.

   b. Bids came in on budget and project was awarded to a local firm

   c. Renovations to 3rd and 4th floors except for mechanicals and electrical were originally thought to be off the table due to budgetary constraints, but the teaching/learning classroom on third floor and a quiet study room on the fourth floor have been added to this phase of the project.

2. Develop plans for providing optimal library services, sources, and programs during the renovation.

   a. Library and Learning Commons staff worked with renovation Project Manager and others across campus to develop a plan to vacate the building during renovation and still provide services, resources and programs for students, faculty, staff, and the community.

   b. Renovation news, plans to close the library for a year beginning January 2016, and information on services were communicated repeatedly and in multiple venues.
10. What action(s) does your unit plan to take to support this unit goal?

1. Library and its many partners across campus work to implement plan to close library building but continue to offer Library/Learning Commons Services during the year-long renovation.

   a. Relocate as many liaison librarians as possible to academic departments and secure offices for others.
   b. Relocate all library staff units to appropriate spaces across campus
   c. Relocate Writing center and tutoring back to Kettler hall during the renovation
   d. Reassign ITS consultants to other computer labs across campus
   e. Relocate tables and chairs and white boards in the Learning Commons to alternate spaces for student use during the renovations
   f. Relocate Learning Commons+ soft furniture to alternative spaces for student use during renovation
   g. Relocate 24/7 computing/study space to Neff
   h. Create a Library Services Center in the vacated 24/7 computing space that will provide primary services to students and faculty including checkout of books, laptops, and iPads, librarian research consulting, IM and email reference services, and computing for disabled students and guest users.
   i. Set up an information desk on the skybridge to answer basic information questions.

2. Library/Learning Commons partners will work with Architects and Interior Design consultants to select furniture and equipment for the first floor, second floor, teaching/learning classroom, quiet study room and group study, presentation/practice rooms

3. Library/Learning Commons partners will respond to student/faculty concerns during renovation and adjust services as needed

4. Helmke Refresh Marketing Committee will continue to communicate in a variety of venues to keep the campus community up-to-date on the renovation, such as the Helmke Library Refresh website.

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

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

1. Respond within 24 hours to students, faculty, staff and community voicing questions, concerns, or suggestions about the library renovation and services.

2. While we will continue to collect library and Learning Commons use statistics we will need to take into account the impact of library closure on use statistics.

3. Successful completion of renovation and grand opening in January 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?

Renovation budget is adequate for engineering and mechanicals upgrades and most of the furniture and equipment.

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

The library will be using some or all of its undesignated foundation funds to build the teaching/learning classroom and purchase some of the furniture and equipment needed for the building.
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

<table>
<thead>
<tr>
<th>Are clearly stated budget plans included for each goal? (A budget plan is considered ‘clearly stated’ if it includes an amount and the funding source.)</th>
<th>No budget information is provided.</th>
<th>Budget plan is included but is not clearly stated.</th>
<th>Goal has a clearly stated budget plan.</th>
</tr>
</thead>
</table>

### TASK FORCE COMMENTS AND/OR QUESTIONS:

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

Lack of control over the construction costs and timeline

### RUBRIC

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

### TASK FORCE COMMENTS AND/OR QUESTIONS:

19. What is your timeline for accomplishing this goal?

1-2 years

Dates: December 2015-December 2016 - Renovation. Library plans to reopen in January 2017 before spring semester begins
<table>
<thead>
<tr>
<th>RUBRIC</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Are time frames included for each performance measure (metric)?</strong></td>
</tr>
<tr>
<td>No time frames are included with the performance measures.</td>
</tr>
<tr>
<td>Some of the performance measures include time frames.</td>
</tr>
<tr>
<td>All performance measures include time frames.</td>
</tr>
</tbody>
</table>

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

1. Enter a unit goal:

University administration recognizes the importance of maintaining a university archives that documents its institutional memory and commits resources to develop a digital only archive consisting of records selected for their value in documenting IPFW's institutional history.

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: Goal is ongoing but not one of our 3-5 active goals. See question #9 below for accomplishments related to this goal

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

5. Type of goal:

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

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

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

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

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

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

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

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

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

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

Last year’s USAP Task Force Commented: “The unit notes that this goal does not fit neatly with any of the stated university goals in Plan 2020, but we agree that creating a digital archive of university materials is important not only for historical, but also for administrative purposes. Not digitizing the institutional memory of IPFW will lead to problematic gaps in our knowledge of our own institutional past.”

Appears even more critical now with the possibility of losing our IPFW identity in the near future....

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

1. Proposal for a digital only university archive approved by Chancellor and VCAA Drummond
2. Budget for new software platform and new scanner approved and purchased
3. New full-time and part-time operations/technical postions approved and hired
4. Digital Initiatives Administrator position approved and is in search process with expected hire date of May 2016
5. Digital University Archives authorizing document that confirms the archives’ existence and confers the authority to accomplish its mission, defines the institutional records it will collect, and provides the rationale, focus, and budgetary commitment necessary for the continuity of the archives program is in draft.

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

Building the IPFW digital only archive will be ongoing for years, but with the commitment of the OAA to support it with necessary resources, this goal can move to library’s New Goals for 2015-2016- # 1. Reallocate library resources (personnel and budget) to strengthen expertise in dealing with digital materials of all types including new forms of scholarship, teaching and learning resources, special collections and research data.

| 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.

<table>
<thead>
<tr>
<th>RUBRIC</th>
</tr>
</thead>
</table>
| **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**

Select Yes/No

**Benefited**

Select Yes/No

**S & W — Recurring**

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

**Non Recurring**

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

**S & E — Recurring**

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

**Non Recurring**

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

**Equipment — Recurring**

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

**Non Recurring**

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

**Other: Describe:**

Click here to enter text.

**Other — Recurring**

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

**Non Recurring**

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

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

Click here to enter text.
RUBRIC

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

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

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

Click here to enter text.

RUBRIC

| 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:**
New Goals for 2015-2016 - #1

1. Enter a unit goal:

   Reallocate library resources (personnel and budget) to strengthen expertise in dealing with digital materials of all types including new forms of scholarship, teaching and learning resources, special collections and research data.

2. Status of goal:

   □ Completed   □ Eliminated   □ Modified   ☒ In Process   □ New

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

   Click here to enter text.

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

4. If eliminated or modified, state reason:

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

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

5. Type of goal:

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

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

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

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

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

<table>
<thead>
<tr>
<th>1st Plan 2020 Goal</th>
<th>Area I Goals</th>
<th>Area II Goals</th>
<th>Area III Goals</th>
<th>Area IV Goals</th>
</tr>
</thead>
<tbody>
<tr>
<td>I.B - Student engagement</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td></td>
</tr>
<tr>
<td>2nd Plan 2020 Goal</td>
<td>I.E - Signature programs</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>II - Promote knowledge</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 role of academic libraries is changing dramatically from a warehouse of print materials to access to online resources of all types. The digital age requires the repurposing of library space and the transition of staff from standard library activities based upon a predominantly print collection to new programs and services based upon virtual information resources which require different facilities, equipment, expertise, knowledge and skill sets.

The Association of College and Research Libraries Standards charge academic libraries not only to support access to commercial online resources, but to build digital collections that are unique to their campus and region (because if we don’t who else will)? It also charges academic libraries to promote the scholarship, research and creative endeavors of its students and faculty through open access repositories that archive and preserve this work, but also provides global open access to the work promoting the creation, integration and application of knowledge (IPFW Goal II).

The knowledge, software expertise, and equipment in digitization projects acquired to date has enabled us to launch a new digital project, IPFW’s digital university archive, on behalf of the university and community.

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

1. Transitioned staff from traditional library activities based upon a predominantly print collection to new programs and services based upon virtual information resources which require different expertise, knowledge and skills.
   a. Completed review of all clerical, administrative staff and librarian job descriptions
   b. Migrated 8 staff and 2 librarians to higher-value responsibilities and increased wages/salaries
   c. Provided significantly more funds for training on and off campus in new responsibilities

2. Expanded Digital Initiatives Group to include teams responsible for mDON, Opus, University Archives, and LibGuides.
   a. Hired Science and Scholarly Communication librarian and revised job description of two clerical staff to assist in the development and maintenance of Opus, IPFW’s open access repository for student and faculty research and creativity and created Opus Team.
   b. Funded attendance at 3-day administrative training and certification on Digital Commons software system (used by Opus) for the Science and Scholarly Communication Librarian
   c. mDON Team launched three new digital collections - “Complete the Picture” a project of the IPFW 50th Anniversary to engage the help of alumni, current and former faculty and staff, and the community to identify the people, places, events, and dates of the photos related to IPFW,
“Englehart Cartoons” Bob Englehart, editorial cartoonist for the Fort Wayne Journal-Gazette and Fort Wayne native, donated almost 400 cartoons and other drawings to the IPFW University Archives. The drawings comment on local and national politics, world events, important issues, and other topics, and offer a unique perspective on the times, and the “Northeast Indiana Diversity Library” representing items from their collection of LBGT materials.

d. Established LibGuide Team to improve the reliability and quality of online guides. These improvements have included extensive link-checking, consolidation of digital assets, and mapping.

e. Gained approval and funding from OAA to create a digital-only University Archive at IPFW, including hiring a full-time and part-time operations/technical positions and funds for new software platform and new scanner.

4. Work with Senate Library Subcommittee to promote open access at IPFW

a. Prepared information about Open Access for faculty and Senate Library Subcommittee sponsored faculty forum on Open Access (OA) for faculty

b. Senate Library Subcommittee prepared Open Access resolution for vote by faculty. Senate passed Open Access resolution which grants the University non-exclusive rights to faculty scholarly articles and frees faculty from losing all rights to their scholarship. OA resolution also requires scholarly articles to be deposited in Opus.

5. Invest in selection and delivery of e-book collections

   a. Investigated ebook purchase/subscription options

   b. Subscribed to pilot ebook collection

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

    1. Transition staff from traditional library activities based upon a predominantly print collection to new programs and services based upon virtual information resources which require different expertise, knowledge and skills.

       a. Increase library budget for professional development and training of librarians and staff to develop expertise in dealing with digital materials of all types, including new forms of scholarship, teaching and learning resources, special collections, and research data

       b. Hire and train more student workers to assist in digitization

    2. Establish priorities and process of new library Scholarly Communication team (Opus)
a. Standardize procedures for updating and maintaining current collections in Opus

b. Identify new collection possibilities for Opus, prioritize and implement

c. Provide Curriculum Vitae (CV) service for faculty (solicit CVs for team members to update Opus with up-to-date research and creative accomplishments of faculty.

3. Launch collections in process – Fort Wayne Art School, Heard on Campus, and Remnant Trust

4. Train new member of LibGuide team

5. Create a digital-only University Archive at IPFW
   a. Determine feasibility of migrating mDON collections (using CONTENTdm software) to Preservica platform which will be used for new IPFW digital university archive.
   b. Digital Initiatives Administrator position approved and is in search process with expected hire date of April 4, 2016
   c. Develop and get approval of Digital University Archives authorizing document that confirms the archives’ existence and confers the authority to accomplish its mission, defines the institutional records it will collect, and provides the rationale, focus, and budgetary commitment necessary for the continuity of the archives program

6. Work with Senate Library Subcommittee to promote open access at IPFW
   a. Develop procedures for implementing Open Access policy at IPFW
   b. Provide workshops for faculty and students on scholarly communication issues such as predatory journals, impact factors, altmetrics, and open access publishing

7. Expand investment in selection and delivery of e-book collections
   a. Evaluate e-book use and make changes as needed

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

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

   a. Amount and use of budget reallocation for travel, professional development and training
   b. Amount and use of budget increase for staff and digitization S & E
   c. # of new collections in Opus, # of items added to Opus, # of hits and downloads of items in Opus
   d. # of items added to mDON and use data
   e. Successful hire of Digital Initiatives Administrator
   f. OAA approval of Digital University Archive authorizing document
   g. Progress in adding content in Digital University Archive
   e. # of ebook purchases, cost, and use benefit analysis
   f. # of Open Access articles added to Opus
   g. # and type of information provided to faculty and students on scholarly communication issues

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

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

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

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

Click here to enter text.

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

S & E budget has been reallocated to include more funds for professional development, travel, and training in new service areas. Staff job responsibilities have been reallocated to include digital projects.

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

The library will be able to begin to accomplish many of its action plans but perhaps not as knowledgeably, effectively, and quickly.

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 No

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

   S & E — Recurring Yes $\$: 26,785
   Non Recurring Select Yes/No $\$: Click here to enter amount.

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

$4,000 Part-time wages for student workers to do scanning for digital university archives
$10,785 ContentDM annual license and hosting fee
$12,000 Preservica annual license and hosting fee

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

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

None
19. What is your timeline for accomplishing this goal?

3-5 years

Dates: This goal is ongoing but the digital university archives startup will probably take 3-5 years.
New Goals for 2015-2016 - #2

1. Enter a unit goal:

   Engage the campus and broader community through multiple strategies in order to advocate, educate, and promote the value of library services, resources, and programs.

2. Status of goal:

   ☐ Completed   ☐ Eliminated   ☐ Modified   ☒ In Process   ☐ New

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

   Click here to enter text.

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

4. If eliminated or modified, state reason:

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

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

5. Type of goal:

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

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

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

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

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

<table>
<thead>
<tr>
<th>1st Plan 2020 Goal</th>
<th>Area I Goals</th>
<th>Area II Goals</th>
<th>Area III Goals</th>
<th>Area IV Goals</th>
</tr>
</thead>
<tbody>
<tr>
<td>I - Foster student success</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
</tr>
<tr>
<td>2nd Plan 2020 Goal</td>
<td>Choose an item.</td>
<td>II - Promote knowledge</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
</tr>
<tr>
<td>3rd Plan 2020 Goal</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>III.A - Collaborations and research</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?

Library services and resources are no longer restricted to a physical space (library building). Librarians can be as effective, or more effective in expanding student and faculty awareness of resources, services and expertise by working with students and faculty outside the library - in the classroom, in the department, at campus events, and in collaboration with other administrative units on campus such as IPSGA, TRIO, Women and Returning Adults, Honors, Military Student services, CELT and many more. This promotes University Goal 1, 2, 3, and 4.

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

1. Library personnel engage in their role as ambassadors in order to expand user awareness of resources, services, and expertise.

   a. Librarians are actively engaged with faculty and students in their liaison departments
   
   b. Librarians and staff collaborate with other units on campus to promote student success
      
      - Librarians have created a Collaboration Index that documents their interactions, outside the classroom, with faculty students, and campus administrative units that provide student support services.
      
      - Collaboration Index benchmark data used to determine contacts made, contacts that need to be made, and contacts that need to be re-engaged.

   c. Librarians and staff participate in campus events such as Freshman Fest, Big Event, Chancellor’s Fall Tour, Summer Fest, IPFW 50th Anniversary events, Graduation, Omnibus Lecture Series (librarian also on selection committee), etc.

2. Library personnel participate in campus decision making needed for effective library management (ACRL Standard 7.2)

   a. Librarians serve on 14 Senate Committees and Subcommittees including Curriculum Review Subcommittee, Gen Ed Subcommittee, Professional Development Subcommittee, Promotion and Tenure Subcommittee, Budgetary Affairs Subcommittee and Graduate Subcommittee.

   b. Librarians and staff are also members of the USAP Committee, University Budget Committee, Military Student Services Advisory Board, Assessment Council, Student Research and Creative Endeavor Poster Symposium Planning Committee, Student Employee of the Year Selection Committee, IPFW CASTLE, IPFW 50th Anniversary Committee, and more.

3. The Library partners with multiple institutions for greater cost-effectiveness and to expand access to collections (e.g. via collections consortia)
a. Librarians serve on IU and statewide library organizations with the mission to improve library services for all students and faculty, such as Academic Libraries of Indiana (ALI) Scholarly Communication Committee, Academic Libraries Shared Print Project Executive Committee, ALI Information Literacy Committee.

b. IPFW Helmke Library participates in IU, Purdue, Academic Libraries of Indiana, and MCLS consortial contracts for scholarly databases, journals, ebooks, etc. that expand access to resources available to IPFW students and faculty.

c. IPFW Helmke Library is part of a statewide and nationwide reciprocal borrowing program for faculty and students.

d. IPFW participates in world-wide document delivery services network.

4. Library develops meaningful collaborations with regional, national, and global partners.

a. Installed Rotary Little Free Library – partnered with DCS and Rotary Club.

b. Met with FWCS media specialists to discuss developing a Writing Center, developing a digital library of guides, redesigning a space for Learning Commons, and virtual reference.

c. Collaborated with Manchester College of Pharmacy about shared resources.

d. Promoted statewide funding for INSPIRE to Indiana Legislators.

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

1. Library personnel engage in their role as ambassadors in order to expand user awareness of resources, services, and expertise.

   a. Librarians will continue to be actively engaged with faculty and students in their liaison departments.

   b. Librarians and staff will collaborate with other units on campus to promote student success.

      - Librarians have created a Collaboration Index that documents their interactions, outside the classroom, with faculty students, and campus administrative units that provide student support services.

      - Collaboration Index benchmark data used to determine contacts made, contacts that need to be made, and contacts that need to be re-engaged.
c. Librarians and staff will participate in campus events such as Freshman Fest, Big Event, Chancellor’s Fall Tour, Summer Fest, IPFW 50th Anniversary events, Graduation, Omnibus Lecture Series (librarian also on selection committee), etc.

2. Library personnel will participate in campus decision making needed for effective library management

a. Librarians will serve on Senate Committees and Subcommittees

b. Librarians and staff will serve on relevant campus committees

3. The Library will partner with multiple institutions for greater cost-effectiveness and to expand access to collections (e.g. via collections consortia)

a. Librarian will serve on IU and statewide library organizations with the mission to improve library services for all students and faculty

b. IPFW Helmke Library will participate in IU, Purdue, Academic Libraries of Indiana, and MCLS consortial contracts for scholarly databases, journals, ebooks, etc. that expand access to resources available to IPFW students and faculty

c. IPFW Helmke Library will remain part of a statewide and nationwide reciprocal borrowing program for faculty and students

d. IPFW Library will participate in world-wide document delivery services network

4. Library will continue to develop meaningful collaborations with regional, national, and global partners

| 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?

1. Collaboration Index – developed by the library this data file tracks library involvement in faculty and student activities across campus – the number of events, hours spent and number and type of participants.
2. Librarian and staff annual reviews
3. Resource sharing statistics

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

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

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

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 support, mentor, encourage, and encourage librarians and staff to collaborate with faculty, take part in campus events and work with other administrative units to engage with students, faculty and staff in a variety of venues.

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?

none

**RUBRIC**

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

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

19. What is your timeline for accomplishing this goal?

5+ years

Dates: ongoing

**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 - #3

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

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

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

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

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

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

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

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

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

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

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

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

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

Click here to choose.

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

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

Click here to enter text.

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

Click here to enter text.

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

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

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

Click here to enter text.

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

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

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

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

Click here to enter text.

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

Click here to enter text.

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

Click here to enter text.

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

   CUL - # of positions needed  Click here to enter text.
   Benefited  Select Yes/No

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

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

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

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

Click here to enter text.

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

TASK FORCE COMMENTS AND/OR QUESTIONS:

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

Click here to enter text.

<table>
<thead>
<tr>
<th>RUBRIC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Are clearly stated challenges identified for each goal? (A challenge is 'clearly stated' if it is explained in detail along with a contingency plan to overcome the challenge). May not pertain to each goal.</td>
</tr>
<tr>
<td>Challenges are not included in the unit's report.</td>
</tr>
</tbody>
</table>

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

Click here to choose.

Dates:  Click here to enter text.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Click here to choose.

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

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

Click here to enter text.

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

Click here to enter text.

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

TASK FORCE COMMENTS AND/OR QUESTIONS:

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

Click here to enter text.

<table>
<thead>
<tr>
<th>RUBRIC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Are clearly stated performance measures provided for each goal?</td>
</tr>
<tr>
<td>The unit provided performance measures but they are not clearly stated.</td>
</tr>
</tbody>
</table>

TASK FORCE COMMENTS AND/OR QUESTIONS:

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

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

Click here to enter text.

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

Click here to enter text.

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

Click here to enter text.

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

CUL - # of positions needed  Click here to enter text.
Benefited  Select Yes/No

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

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

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

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

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

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

Click here to enter text.

**RUBRIC**

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

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

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

Click here to enter text.

**RUBRIC**

| 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.

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

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

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

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

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

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

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

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

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

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

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

<table>
<thead>
<tr>
<th>1st Plan 2020 Goal</th>
<th>2nd Plan 2020 Goal</th>
<th>3rd Plan 2020 Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Area I Goals</td>
<td>Area II Goals</td>
<td>Area III Goals</td>
</tr>
<tr>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
</tr>
</tbody>
</table>

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

Click here to choose.

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

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

Click here to enter text.

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

Click here to enter text.

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

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

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

Click here to enter text.

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

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

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

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

Click here to enter text.

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

Click here to enter text.

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

Click here to enter text.

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

CUL - # of positions needed  Click here to enter text.
Benefited  Select Yes/No

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

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

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

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

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

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

Click here to enter text.

### RUBRIC

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

### TASK FORCE COMMENTS AND/OR QUESTIONS:

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

Click here to enter text.

### RUBRIC

| 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.

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

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