University Strategic Alignment Process Report
Indiana University – Purdue University Fort Wayne
Marketing Communications
Part I

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

   Marketing Communications’ (MC) mission is to create demand for university services by supporting its mission through student recruitment and retention, fundraising, and brand awareness, image, and visibility initiatives.

| 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.

   Results include generating over 21,000 marketing leads and 1,400,000 unique, off-campus ipfw.edu visitors, as well as engaging over 25,000 social media followers in FY15. Highlights include providing Enrollment Management (nearly 350 Admissions, Collegiate Connection, Graduate Studies, International Education, and Summit Scholars projects amongst others) and Advancement (nearly 225 Development, Alumni Relations, and CollegeTV projects) support; launching the Don Difference with the vice chancellor for academic affairs; producing the Leadership Center proposal, amongst others, for the vice chancellor of advancement and the chancellor; supporting chancellor initiatives, including the legislative agenda and Omnibus amongst others; and regularly publishing Inside IPFW and self-service tools (e.g., over 20 templates, style guides, DIY kits, university signatures, etc.).
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?

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:

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?
The following data are based on our mission and Advancement’s strategic plan. “Target” metrics are used when a measurement has been in use for more than one fiscal year, and “baseline” versions are implemented when in use for less than one fiscal year. All metrics are intended to be measurable over a specified time period.

Resources Allocated

- Baseline: 50% student recruitment and retention; 25% fundraising; and 25% image/visibility
- Actual: 37% student recruitment and retention; 22% fundraising; 21% image/visibility; and 17% other

Leads Generated

- Baseline/Actual: 21,437

Audience Engagement

- Off-Campus Web (baseline/actual)
  - Sessions: 2,606,206
  - Unique Visitors: 1,401,835
  - Average Pages Per Visit: 2.63
  - Average Time on Site: 0:02:02
  - Average Bounce Rate: 58.03%
- Social Media (baseline/actual)
  - Facebook
    - Total Likes: 16,208
    - Weekly Reach: 30,989
    - Weekly Engagement: 2,803
  - Twitter
    - Followers: 7,132
    - Tweet Impressions: 348,000
    - Mentions: 352
  - Instagram Followers
    - Followers: 2,000
    - Likes: 1,353
    - Comments: 22
5. Do you wish to provide any response to last year’s task force comments?

While last year’s task force comments were generalized (i.e., “The goals listed were very ambitious and we felt that many of the action items could have in fact served as their own goals. The completion of even just a few of these items would be very beneficial to IPFW.”), they represent the comprehensive nature of and value with which Marketing Communications operates. All fiscal year 2015 (FY15) goals were completed, maintained, or further developed. As the task force noted throughout, many goals were perceived to lack resources; yet, the Marketing Communications team achieved completion or progress toward all metrics with existing resources. Moreover, many goals, actions, and metrics are required to simply perform and maintain mission alignment. The task force also questioned whether some goals, metrics, and actions should be juxtaposed. Our report was specifically developed to show alignment with measurable outcomes, including binary values (i.e., yes or no a metric was completed), one of which became performance metrics for this year (i.e., resource allocation). To this end, a meeting would have sufficiently clarified expectations and an understanding of Marketing Communications’ process and mission.

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

Aaron McClaskey, Bart Tyner, Bobbi Shadle, Jack Patton (primary), Jim Whitcraft, Kathryn Hopkins, Katie Briner, Lea Ann Powers, Nan Bremer, Ruth Petitti, Susan Alderman, and Tamara Sorg
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:

Make information accessible

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?

Marketing Communications executed its actions—consistently maintained, modified, applied, and upheld the university’s brand, coinciding standards (i.e., identity system, trademark guidelines, etc.), and market resources; promoted clarity and consistency across the university’s brand; supported ipfw.edu and its hosted content; and made brand-appropriate marketing templates available throughout the year. The team also met its metrics—followed brand standards with all projects created in the department, published standards internally (i.e., online, on job jackets, in knowledge base, etc.); made standards available to the campus; met with ITS constituents at least twice per month to discuss ipfw.edu support (when necessary and appropriate); and produced two template designs per month for fliers, brochures, programs, presentations, invitations, posters, newsletters, and postcards when fully staffed.

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

4. If eliminated or modified, state reason:

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

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

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

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

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

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

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

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

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<thead>
<tr>
<th>1st Plan 2020 Goal</th>
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<td>Choose an item.</td>
<td>Choose an item.</td>
<td></td>
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<td>III - Hub for competitiveness</td>
<td>Choose an item.</td>
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7. Is the unit goal a high, medium or low priority?
   Click here to choose.

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

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

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

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

11. With what metrics will you assess progress toward accomplishing this unit goal on an annual basis?
    Click here to enter text.
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| Are clearly stated performance measures provided for each goal?  
(Performance measures are considered ‘clearly stated’ if a benchmark and quantitative measurement is included). | The unit provided performance measures but they are not clearly stated. | Some of the stated performance measures are clearly stated. | All performance goals are clearly stated. |

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

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

    Click here to choose.

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

    Click here to enter text.

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

    Click here to enter text.

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

    Click here to enter text.

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

    CUL - # of positions needed  
    Benefited  
    Click here to enter text.  
    Select Yes/No
S & W — Recurring
Select Yes/No
$$: Click here to enter amount.

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

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

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

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

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

Other: Describe:  
Click here to enter text.

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

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

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

Click here to enter text.

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| TASK FORCE COMMENTS AND/OR QUESTIONS: |

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

Click here to enter text.
### RUBRIC

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<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>
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### TASK FORCE COMMENTS AND/OR QUESTIONS:

19. What is your timeline for accomplishing this goal?

Click here to choose.

Dates:  
Click here to enter text.
Goal 2

1. Enter a unit goal:

   Better understand, communicate, and respond to marketplace conditions and university 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?

   Click here to enter text.

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

4. If eliminated or modified, state reason:

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

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

5. Type of goal:

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

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

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

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

High priority

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

Enhance efficiencies and effectiveness and mission alignment for the university and unit
9. If continuing your goal, what progress have you made or which action steps have been completed?

• Research conducted by the Center for Social Research to create consumer profiles for enrolled undergraduate, graduate, and Collegiate Connection students has been funded and is nearly complete (as of 1/5/16). This will create the foundation for brand positioning and market place differentiation, which, in turn, will influence a university-wide marketing plan.

• Raised awareness of interdependencies between direct and indirect costs and departmental operating model that supports a sustainable strategic marketing plan.

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

1) Work with the Center for Social Research to complete the research, share findings with the university, and use as an integral component of a university-wide marketing plan in FY16. [metrics below]

2) Develop brand positioning for the university and its colleges based on research findings [metrics below]

3) Develop a university-wide marketing plan [metrics below]

4) Create specific USAP goal for developing and implementing a university-wide marketing plan [metrics below]

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

1) Complete the market research

2) Complete brand positioning for the university and colleges

3) Begin to develop a university-wide marketing plan

4) Create new goal for FY16 USAP report
(Note: measurement values are binary. E.g., did we complete the research and begin developing a university-wide marketing plan?)

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

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

Yes, we are able to complete this unit goal since the research was funded. The marketing plan will, however, be dependent on human and financial capital necessary to operationalize these efforts. To this end, a dedicated brand awareness budget is sought in the first new goal for FY16 USAP efforts. While indirect costs (i.e., labor or human capital) can facilitate the marketing plan, its effectiveness and efficiency will be greatly compromised without direct costs (i.e., financial capital) and an appropriate operating model.

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?

- Indirect costs will be used to support research and brand positioning, as well as the development of a university-wide marketing plan and operating model.

- Direct costs to support research are provided by the Chancellor.

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

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

Click here to enter text.

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

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

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

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

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

Other: Describe:   Click here to enter text.

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

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

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### TASK FORCE COMMENTS AND/OR QUESTIONS:

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

Competing demands and the department’s operating model are the most significant challenges and constraints. As previously noted, resource allocation (i.e., supporting a university-wide marketing plan through direct and/or indirect costs) is an important consideration.

### RUBRIC

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### TASK FORCE COMMENTS AND/OR QUESTIONS:

19. What is your timeline for accomplishing this goal?

Finish research and brand positioning, and begin to develop a university-wide marketing plan

Dates: June 30, 2016
<table>
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<td><strong>Are time frames included for each performance measure (metric)?</strong></td>
</tr>
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**TASK FORCE COMMENTS AND/OR QUESTIONS:**

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Goal 3

1. Enter a unit goal:

   Proactively coordinate and manage university marketing communications platforms

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?

   Marketing Communications executed its actions—developed and published an editorial calendar w/ key campus events (e.g., student recruitment, student life, athletics, fundraising, community, etc.) and identified communication platforms across campus. The team also met most of its performance metrics—reviewed editorial calendar and identified ways in which select initiatives could be distributed across communication platforms.

   **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?

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

   Click here to choose.

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

   Click here to enter text.

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

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

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TASK FORCE COMMENTS AND/OR QUESTIONS:

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

    Click here to enter text.
RUBRIC

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

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

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

   Click here to choose.

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

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

   Click here to enter text.

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

   Click here to enter text.

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

   CUL - # of positions needed   
   Benefited   

   Click here to enter text. 

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

Click here to enter text.

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

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

19. What is your timeline for accomplishing this goal?

Click here to choose.

Dates: Click here to enter text.

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

1. Enter a unit goal:

   Be good stewards of university resources

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?

   Marketing Communications executed its actions—effectively managed staff, finances, equipment, systems, supplies, and investments of time and maintained mission alignment between the department and university (and its strategic plan). The team also met its performance metrics—implemented and maintained department-wide (staff) capacity baseline, dashboard, and metrics with forecasting capabilities; reviewed (staff) capacity utilization levels at least once per week; implemented and maintained process for project management; reviewed current project production schedule with the entire department at least once per week; implemented and maintained knowledge base, standards and best practices, and client training (i.e., How to Work with Marketing Communications) and communicated updates; implemented and maintained an internal process for expense requests; reviewed expense requests at least once per week; implemented and maintained and budget dashboard with forecasting capabilities; did not run a budget deficit without necessary and appropriate approval; and reviewed, updated, and saved appropriate inventory lists (e.g., computers, photography, etc.) once per year.

   **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.

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

Select up to three Plan 2020 Goals to align with. Choose only one goal for each row.
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7. Is the unit goal a high, medium or low priority?
   Click here to choose.

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

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

10. What action(s) does your unit plan to take to support this unit goal?
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### TASK FORCE COMMENTS AND/OR QUESTIONS:

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

   Click here to choose.

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

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

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

   CUL - # of positions needed  
   Benefited  

   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
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$$: Click here to enter amount.

Other: Describe:  Click here to enter text.

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

Non Recurring
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$$: Click here to enter amount.

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

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

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

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### TASK FORCE COMMENTS AND/OR QUESTIONS:

19. What is your timeline for accomplishing this goal?

   [Click here to choose.]

   Dates: [Click here to enter text.]

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

1. Enter a unit goal:
   Enhance the knowledge and skill level of department staff

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

3. If goal has been completed, what was the impact on your unit and Plan 2020?
   Marketing Communications executed its action plan—maintained best practices in industry standards and regularly sought out and shared new information and ideas across the department. The team also met its performance metrics—maintained an internal knowledge base; attended at least one industry conference per year; maintained membership in at least one professional organization per year (e.g., CASE, AMA, etc.); sought out and/or created opportunities to apply new information and ideas; and published and made best practices and processes available to the campus (e.g., online, print, etc.).

   **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.

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

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

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| 2nd Plan 2020 Goal | | II - Promote knowledge | | Choose an item. |
|--------------------| | Choose an item. | | |

| 3rd Plan 2020 Goal | | III - Hub for competitiveness | | Choose an item. |
7. Is the unit goal a high, medium or low priority?
   Click here to choose.

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

9. If continuing your goal, what progress have you made or which action steps have been completed?
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10. What action(s) does your unit plan to take to support this unit goal?
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   TASK FORCE COMMENTS AND/OR QUESTIONS:

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

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

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

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

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

Click here to enter text.

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

19. What is your timeline for accomplishing this goal?

   Click here to choose.

   Dates:  Click here to enter text.

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

1. Enter a unit goal:

Seek out and promote scholarly endeavors across university

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?

Marketing Communications executed its actions—met with the campus community to identify opportunities, reviewed internal publications for news and information, collaborated with the chief communications officer, shared pertinent information throughout the department, and distributed relevant story (or stories) through one or more marketing communications channels. The team met its performance metrics—met with campus clients at least once per month to look for appropriate material, incorporated pertinent material into marketing projects within three months, and met with chief communications officer once per semester to discuss and coordinate material. As a result, the Don Difference was launched and progress has been made to further support Institutional Research, Scholarship, and Creative Endeavor.

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?

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

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

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

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

   Click here to choose.

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

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   CUL - # of positions needed  
   Benefit select Yes/No
S & W — Recurring  Select Yes/No  $$: Click here to enter amount.
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17. If you were to receive the additional resources outlined in question #16, how will they be used?

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

Click here to choose.

Dates:   Click here to enter text.
New Goals for 2015-2016 - #1

1. Enter a unit goal:
   
   Develop and implement a university-wide strategic marketing plan (SMP)

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.**

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<td>Choose an item.</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
</tr>
<tr>
<td>3rd Plan 2020 Goal</td>
<td>III - Hub for competitiveness</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
</tr>
</tbody>
</table>

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

High

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

Better understand, coordinate, and respond to marketplace conditions and competitive differentiation throughout the university
9. If continuing your goal, what progress have you made or which action steps have been completed?

Click here to enter text.

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

1) Create demand for university services [metrics below]
2) Procure a dedicated brand awareness budget (to support the SMP) [metrics below]
3) Evaluate staffing needs and implement an optimal operating model [metrics below]
4) Cultivate and distribute testimonials [metrics below]
5) Create and distribute relevant academic stories, high-impact educational experiences, and personalized faculty and student successes [metrics below]
6) Identify and distribute significance of regional, national, and international opportunities available on campus [metrics below]
7) Define and communicate SMP progress and outcomes [metrics below]
8) Form Marketing Communications Advisory Council [metrics below]

<table>
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<tr>
<th>RUBRIC</th>
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<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) Produce, track, and analyze 21,000 leads per fiscal year through direct response mechanisms in all media (print, digital, audio, multimedia, etc.); and engage 20,000 social media followers per fiscal year by June 30, 2017
2) Submit budget request through the University Budget Committee process before April 1, 2016
3) Use capacity utilization studies to determine appropriate staffing levels; and develop model for supporting SMP with direct and indirect costs by June 30, 2016

4) Create 20 student success stories and 20 student, 10 faculty and alumni, and five donor and employer testimonials per year by June 30, 2017

5) Meet with Honors Program, International Education, Career Services, the Office of Academic Internships, Cooperative Education, and Service Learning (OACS), and the Institute for Research, Scholarship, and Creative Endeavors (IRSC) individually once per semester to discuss needs and identify project potential; and publish 20 student success stories per fiscal year, as well as 20 student, 10 faculty and alumni, and five donor and employer testimonials by June 30, 2017

6) Produce one ethos project per year (similar to the Don Difference, Celebrate IPFW Blue, 50th Celebration, etc.) by June 30, 2017

7) Develop, report, and distribute key metrics on a quarterly basis by June 30, 2017

8) Utilize Council and new/existing communication channels to support SMP by highlighting faculty and student work and successes; connect university constituents with market research, buyer personas, SMP, and Web modernization initiatives; publish and maintain an editorial calendar with Marketing Communications and campus constituents; and participate in university communications committee by June 30, 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?

No, we are unable to effectively accomplish this unit goal with current human and financial capital.
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?

The SMP will be completely reliant on indirect costs (i.e., labor), which mitigates its reach, effectiveness, and efficiency. Most communication will be directed toward digital media, including Web and social media channels. As such, traditional media (i.e., TV, radio, billboards, etc.) will continue to be negated out of necessity and optimizing current marketing investments.

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.

<table>
<thead>
<tr>
<th>CUL - # of positions needed</th>
<th>Select Yes/No</th>
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<tr>
<td>Benefited</td>
<td>Select Yes/No</td>
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| S & W — Recurring          | Select Yes/No | $$: |
| Non Recurring              | Select Yes/No | $$: Click here to enter amount. |

| S & E — Recurring          | Select Yes/No | $$: |
| Non Recurring              | Yes           | $$: 550000 |

| 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?

In total, these funds will be used to operationalize a university-wide strategic marketing plan starting with a brand awareness campaign. Additional information can be found in Ferguson Advertising’s brand awareness campaign outlined in “IPFW Competitive Advertising Intelligence FY16.pdf” (attached separately) and upon request.

$550,000 annually will be used for a three-year brand awareness campaign in the Fort Wayne designated market area (DMA)

Moreover, competitive advertising intelligence can be found in “IPFW Competitive Advertising Intelligence FY16.pdf” wherein other public, private, and for profit higher education institutions have outspent IPFW by more than $3,654,350 (which accounts for more than 25% of the total higher education spend) in the Fort Wayne DMA between January 2010 and June 2015.

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<tr>
<td>Are clearly stated budget plans included for each goal? (A budget plan is considered ‘clearly stated’ if it includes an amount and the funding source.)</td>
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18. What challenges or constraints, other than financial (i.e. federal or state mandates, accreditations, university policy), might affect your progress toward accomplishing this unit goal?

Competing demands from the university
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<td>Are clearly stated challenges identified for each goal? (A challenge is ‘clearly stated’ if it is explained in detail along with a contingency plan to overcome the challenge). May not pertain to each goal.</td>
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<td>Clearly stated challenges are included for this goal.</td>
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**TASK FORCE COMMENTS AND/OR QUESTIONS:**

19. What is your timeline for accomplishing this goal?

   12 months

   Dates: June 30, 2017

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

1. Enter a unit goal:

   Modernize ipfw.edu technology

2. Status of goal:

   ☐ Completed   ☐ Eliminated   ☐ Modified   ☐ In Process   ☒ New

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

   Click here to enter text.

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

4. If eliminated or modified, state reason:

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

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

5. Type of goal:

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

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

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

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

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

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<tr>
<td>I - Foster student success</td>
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<td>Choose an item.</td>
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<td>3rd Plan 2020 Goal</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>III - Hub for competitiveness</td>
<td>Choose an item.</td>
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</table>

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

High

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

Must address accessibility, mobility, demand for new features, content quality, and governance, all of which affect student recruitment and retention, fundraising, and brand awareness.
9. If continuing your goal, what progress have you made or which action steps have been completed?

Resubmitting funding request

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

1) Submit budget request through the University Budget Committee
2) Maintain communication with the Web Advisory Committee
3) Develop a strategic initiative to improve the ipfw.edu experience
4) Outline pros/cons of phased implementation

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

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

1) Submit budget request through the University Budget Committee before April 1, 2016
2) Communicate updates to the Web Advisory Committee once per semester by June 30, 2016
3) Develop a strategic initiative for ipfw.edu before June 30, 2016
4) Outline pros/cons of phased implementation before June 30, 2016
RUBRIC

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

TASK FORCE COMMENTS AND/OR QUESTIONS:

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

No

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

Click here to enter text.

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

Click here to enter text.

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

Minimally maintain existing technology in partnership with ITS

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

CUL - # of positions needed  
Benefited  
Select Yes/No
S & W — Recurring  Select Yes/No  $$: Click here to enter amount.
Non Recurring  Select Yes/No  $$: Click here to enter amount.

S & E — Recurring  No  $$: 225,000
Non Recurring  Select Yes/No  $$: 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?

Please see “IPFW Web Modernization Plan v03-2.pdf” for additional information.

| 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?

Competing demands and an understanding of key issues from the university
### 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?

The proposal’s planning and development take 12-15 months upon approval.

Dates: September 30, 2017

### 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.

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<tr>
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<tr>
<td>2nd Plan 2020 Goal</td>
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<tr>
<td>3rd Plan 2020 Goal</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
<td>Choose an item.</td>
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</table>

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

Click here to choose.

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

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

Click here to enter text.

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

Click here to enter text.

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

| TASK FORCE COMMENTS AND/OR QUESTIONS: |

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

Click here to enter text.

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

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

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

Click here to enter text.

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<th>Challenges are listed but they are not clearly stated.</th>
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TASK FORCE COMMENTS AND/OR QUESTIONS:
19. What is your timeline for accomplishing this goal?

Click here to choose.

Dates: Click here to enter text.

### RUBRIC

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<tr>
<th>Are time frames included for each performance measure (metric)?</th>
<th>No time frames are included with the performance measures.</th>
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**TASK FORCE COMMENTS AND/OR QUESTIONS:**
New Goals for 2015-2016 - #4

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

2. Status of goal:

   - [ ] Completed
   - [ ] Eliminated
   - [ ] Modified
   - [ ] In Process
   - [ ] New

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

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

4. If eliminated or modified, state reason:

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

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

5. Type of goal:

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

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

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

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

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

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

Click here to choose.

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

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

Click here to enter text.

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

Click here to enter text.

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

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

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

Click here to enter text.

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

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

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

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

Click here to enter text.

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

Click here to enter text.

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

Click here to enter text.

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

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

Benefited Select Yes/No

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

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

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

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

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

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

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

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

Click here to enter text.

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

_____________________________
New Goals for 2015-2016 - #5

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

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

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

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

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

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

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

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

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

<table>
<thead>
<tr>
<th>1st Plan 2020 Goal</th>
<th>Area I Goals</th>
<th>Area II Goals</th>
<th>Area III Goals</th>
<th>Area IV Goals</th>
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<td>Choose an item.</td>
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7. Is the unit goal a high, medium or low priority?

Click here to choose.

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

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

Click here to enter text.

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

Click here to enter text.

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<td><strong>Do the unit goals align with the University’s goals?</strong></td>
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**TASK FORCE COMMENTS AND/OR QUESTIONS:**

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

Click here to enter text.

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

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

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

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

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

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

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

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