2015

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

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

   The IPFW Office of the Registrar is dedicated to working in partnership with IU and Purdue to accurately maintain the integrity of the student academic record. In fulfilling this mission, we are committed to provide professional services ethically, reliably and efficiently, striving for continual improvement by focusing on the needs of the university and its constituents. Services provided include: Academic record creation and maintenance, protecting the confidentiality of student academic records, issuing academic transcripts, student enrollment certification, course record management, classroom and space utilization, degree processing and diploma distribution, final exam scheduling, publication of the schedule of classes and university bulletins, student registration management, grade processing, monitoring academic and administrative policies, monitoring NCAA academic progress requirements, course information system design and operation, student information system training, dissemination of accurate, timely information and service on university committees.

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<th>RUBRIC</th>
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<tbody>
<tr>
<td>To what extent was evidence provided to demonstrate how well the unit supports the mission statement of the University?</td>
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   TASK FORCE COMMENTS AND/OR QUESTIONS:

2. Please list significant accomplishments from the last fiscal year not included in your goals.

   No significant accomplishments in 2014-2015.
3. What program-specific accreditations or federal & state laws impact what you do?

- **FERPA** - (Family Education Rights and Privacy Act)
- **Title IX** - Sexual Violence training for new students
- **Indiana House Enrolled Act 1348-2013** (Degree Map and Free Course Guarantee) requires all public colleges provide degree maps to all new first-time full-time students beginning Fall 2014. The law also provides a course-scheduling guarantee to these students; if a course on a student’s degree map for a particular semester is not offered or is full, the institution must provide the course for free in a future semester unless it provides a revised degree map which does not delay graduation.
- **Gramm Leach Bliley Act (GLBA)** requires financial institutions – companies that offer consumers financial products or services like loans, financial or investment advice, or insurance – to explain their information-sharing practices to their customers and to safeguard sensitive data.
- **Payment Card Industry Data Security Standards** (PCI-DSS) is a security standard that serves to protect cardholder information from the various imminent harms.
- **Indiana Senate Enrolled Act 182-2012**, the Statewide Transfer General Education Core (STGEC) enables a student who satisfactorily completes an approved program of general education in any one of those institutions to transfer that coursework to any other state educational institution as a block of 30 credit hours towards the general education core requirement.
- **Indiana SSN and Security Breach Legislation** - Release of SSN (Indiana Code 4-1-10) and Notice of Security Breach (Indiana Code 4-1-11)
- **Gainful Employment** – Annual report to NSLDS which provides financial aid and enrollment details of students in GE programs. IPFW currently has two programs, Dental Assisting Certificate and the Post-Baccalaureate Accounting Certificate.
| 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?

N/A

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

**Until additional IT resources and SIS business analysts are provided and projects are prioritized by IT services, it is difficult to make any progress in goals.**

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

Patrick McLaughlin
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:

   Implement and support systems which allow students to easily find information about courses and easily enroll in the courses needed to progress to degree completion. (Addresses Inefficiency #5 and 20)

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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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?

Theme 7: Strategic Enrollment Management in the Year 1 USAP report identified the need for integrated programs, practices, policies and planning related to SEM. This goal addresses systems in enrollment management which are not up to date and/or inefficient technologically.

The online public schedule of classes, the number one website which is accessed on the IPFW website by students and the general public, requires students to access a second instance of the schedule of classes in order to locate information about distance, hybrid, weekend and off-site courses. Implementing one online schedule of classes will provide an integrated search and view of course offerings regardless of the delivery format or location. The Banner student product has a delivered schedule of classes which can be utilized and IPFW currently owns.

The online IPFW bulletin was implemented in the Fall 2007, and the first release was the 2008-2009 undergraduate and graduate bulletins. The option to provide the bulletin in a mobile application was made available in an upgrade in 2011. Documentation and requests have been submitted to IT services in at least two separate occasions with no response. The mobile app could be incorporated into the IPFW mobile app which was implemented in the Summer 2015. Providing the bulletins in this format would align IPFW with other universities and give students another way to access programs and policies.

In order to efficiently manage physical space and provide data to the campus community regarding the use of space, IPFW needs to invest time and resources in a robust room scheduling software which provides information and access to campus stakeholders. Room scheduling is a core function and expectation of the registrar’s office.

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

IT job requests submitted in March 2015 for prioritization in a project list.

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

- Implement one public schedule of classes for IPFW and Division of Continuing Studies.

- Implement Acalog Mobile Application for the IPFW Bulletins within the existing IPFW Mobile app
- Implement UniTime Room Scheduling Software to increase class room scheduling and space efficiency. UniTime is open source software used by West Lafayette, North Central, and several universities in England, Australia, and elsewhere.

| 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?

**One public schedule of classes for IPFW and Division of Continuing Studies:**

**Objectives:** Contains accurate information and is available to the public and campus community at least three weeks prior to registration. One schedule clearly communicates all of the course offerings of IPFW at any site, on or off campus.

**Performance Measures:** No errors are present in the schedule, deadlines in project timeline met as communicated to the campus through the Master Detail Calendar.

**Acalog Mobile Application for the IPFW Bulletins:**

**Objectives:** Contains accurate information and released on the web before new student registration in June.

**Performance Measures:** No errors are present in the bulletins and deadlines in project timeline met as communicated to the campus through the Master Detail Calendar.

**Implement UniTime Room Scheduling Software to increase class room scheduling and space efficiency:**

**Objectives:** No classroom scheduling conflicts; classes are scheduled in rooms with adequate seating, technology and ADA accommodations; timely room change notifications.

**Performance Measures:** Reports which provide data which shows high space utilization during all class times, identify deficiencies in class patterns usage and answer questions regarding rooms which may need upgrades based on usage.
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?
   
   Unable to accomplish the actions in this goal without IT resources and support of an SIS business analyst (see SIS USAP report).

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  
   0.0
   
   Benefited Select Yes/No
S & W — Recurring  
Select Yes/No  
$$: 0.00

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?

Funding for a full-time SIS business analyst (see SIS USAP report) can support and maintain the initiatives in all goals in this report; provided IT Services support is allocated.

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

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

Convince departments that provide other core functions of the importance of this goal in relation to the integration of services.

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

19. What is your timeline for accomplishing this goal?

1-2 years

Dates: Complete by December 2018

| RUBRIC |
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| 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:
   Allow students to communicate and perform transactions with the Registrar's office more effectively. (Addresses Inefficiencies #1, 6, 19)

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

High

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

Theme 7: Strategic Enrollment Management in the Year 1 USAP report identified the need for integrated programs, practices, policies and planning related to SEM. This
goal addresses systems in EM which are not up to date and/or inefficient technologically. The actions in this goal develop effective SEM practices that serve students (and parents) through all stages of their IPFW careers.

Parent Proxy allows students to control who has online access to their student information and the ability to control that access. The Federal Educational Rights and Privacy Act of 1974 require students to grant access to non-directory information (midterm grades, final grades, financial aid, etc.). The parent proxy access is functionality delivered through the Banner student product which IPFW already owns. Providing this access would be a huge service to our students, parents/guardians, faculty and staff.

At the conclusion of the Fall 2015 semester, over 1,500 students were on academic probation. This represents a substantial percentage of our student body. IPFW must make aggressive steps to communicate and support this portion of our student body to improve retention and graduation. An “academic probation channel or tab” of communication through the myIPFW portal is the logical choice. Pushing information to these students is critical during this time in their academic career. We must leverage the portal to provide information and strategies for success.

The IPFW enrollment offices need to move into the 21st century and implement a document imaging software to more efficiently serve our students and stakeholders on campus. IPFW owns an imaging product as part of the Banner suite of software; however, an investment needs to be made in hardware to make imaging become a reality.

Currently, students are directed to an online form to apply for graduation. When the form is submitted it arrives as an email to a staff member in the registrar’s office and the staff member manually updates the student record and forwards the email to the students’ academic department. The Banner product has delivered an online graduation form that would automatically update the student’s record from the online form upon submission. This functionality would increase efficiency of the staff and decrease the chance for human error and effectively communicate to the department.
9. If continuing your goal, what progress have you made or which action steps have been completed?

IT job requests submitted in March 2015 for prioritization in project list.

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

   1. Enable Parent Proxy.
   2. Implement an Academic probation tab in myIPFW portal.
   3. Implement pop-ups in myIPFW to notify students of important information, such as probation status.
   4. Eliminate paper forms and implement a document imaging system.
   5. Implement the Online Graduation Application in Banner.

| 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. |

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

   1. **Enable Parent Proxy Access in the Banner Student System:**

   **Metrics:** Activate and set-up and test the parent proxy functionality in Banner PPRD test environment and move to PROD system. Document business processes and publicize to students and parents.

   **Performance Measures:** Monitor number of students granting access to parents each term and increased growth each term based on percentage in comparison to total enrollment.

   2. **Implement Academic Probation Tab in myIPFW portal:**

   **Metrics:** Create and test a probation tab and channel content in PPRD myIPFW in collaboration with Academic Advising Council and Student Success and Transitions departments. Move content to PROD myIPFW.

   **Performance Measures:** Monitor number of students completing the required probation course, number of withdrawn courses, and number of advising appointments of students on probation.
3. **Implement pop-ups in myIPFW to notify students of important information, such as probation status:**

**Metrics:** Identify informational pop-ups to push out to students in the portal (this may include academic standing, updating addresses or emergency contact information). Create and test the pop-up functionality in the PPRD test myIPFW portal and move to PROD myIPFW portal environment.

**Performance Measures:** Monitor number of students updating information through the portal and publicize each term to increase percentage of students utilizing functionality.

4. **Eliminate paper forms and implement a document imaging system:**

**Metrics:** Purchase required hardware (servers in IT and document scanners for EM offices) to implement the Banner Imaging software already owned by IPFW. Set-up imaging in test environment and test, train staff and move functionality to Banner PROD.

**Performance Measures:** Percentage of academic units accessing student information via the imaging product, reduced amount of paper sent to departments to communicate student information for advising, increased document security to only staff who “need to know”.

5. **Implement an Online Graduation Application in Banner:**

**Metrics:** Set-up Banner online graduation application in test environment and complete necessary data clean-up of general student records which allows information to auto-flow into the system from the online form. Move online graduation application to Banner PROD.

**Performance Measures:** A minimum of 80% of grad apps are received prior to deadline, no discrepancies are found in graduation lists.

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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?

   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?

   Unable to accomplish the actions in this goal without IT services support and SIS business analyst (see SIS USAP report).

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.

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<th>CUL - # of positions needed</th>
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   | S & W — Recurring | Select Yes/No | $$: 0.00 |
   | Non Recurring      | Select Yes/No | $$: 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?

**Funding for a full-time SIS business analyst (see SIS USAP report) that can implement, support and maintain the initiatives listed in goal #1 and goal #2; provided IT Services support is allocated.**

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<tr>
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| Other: Describe:      | Click here to enter text. |

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

**Multiple departments across campus would benefit from every action item in this goal; however, convincing the departments seems to be the biggest challenge which has stalled these initiatives.**
### RUBRIC

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

### TASK FORCE COMMENTS AND/OR QUESTIONS:

19. What is your timeline for accomplishing this goal?

3-5 years

Dates: Complete by December 2019.

### RUBRIC

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

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

1. Enter a unit goal:
   
   Improve student data management processes with IU and Purdue student systems. (Addresses Inefficiencies #3, 8, 10, 11, 12, 17)

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: Indiana University unable to allocate resources to accomplish action item #1

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

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

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

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

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

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

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

High

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

By programming an addendum grade file of collegiate connection student grades, multiple hours of staff time is saved as they are no longer required to enter the grades
in three student information systems. Transmitting the IPFW academic standing to the WL Banner system provides consistent accuracy on the academic record across systems.

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

Numbers two and three of the action items listed in the next question have been completed with existing resources.

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

   1. Implement a batch load process of the IU student ID into Banner
   2. Program an extraction addendum grade file of Collegiate Connection student grades for transmission and load to West Lafayette Banner (Completed)
   3. Transmit and batch load IPFW academic standing to WL Banner (Completed)

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

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

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

   1. **Implement a batch load process of IU student ID into Banner:**

   **Metrics:** Analyze the business need and write project specifications with an IT programmer analyst, prioritize project with IT Services, write the batch load process, implement in a test environment, validate data load, and move batch process to Banner PROD.

   **Performance Measures:** Monitor weekly batch process and track number of load errors in suspense.

   2. **Program an extraction addendum grade file of Collegiate Connection student grade for transmission and load to PWL Banner system:**
**Metrics:** Analyze the business need and write project specifications with an IT programmer analyst, prioritize project with IT Services, write the batch load process, implement in a test environment, validate data load, and move batch process to Banner PROD.

**Performance Measures:** Monitor batch process and track number of load errors in suspense.

### 3. Transmit and load academic standing for load to PWL Banner system:

**Metrics:** Analyze the business need and write project specifications with an IT programmer analyst, prioritize project with IT Services, write the batch load process, implement in a test environment, validate data load, and move batch process to Banner PROD.

**Performance Measures:** Monitor batch process and track number of load errors in suspense.

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

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

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

   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?

Action items 2 and 3 in this goal have been given IT resources (a programmer analyst) to complete in the past year in conjunction with registrar staff. No progress has been made on Action item 1 due to lack of involvement and resources with IU staff; therefore, this goal was modified and marked as completed.

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?

| RUBRIC |
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| Are clearly stated challenges identified for each goal? (A challenge is ‘clearly stated’ if it is explained in detail along with a contingency plan to overcome the challenge). May not pertain to each goal. | Challenges are not included in the unit’s report. | Challenges are listed but they are not clearly stated. | 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: Completed December 2015
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**TASK FORCE COMMENTS AND/OR QUESTIONS:**

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Goal 4

1. Enter a unit goal:

   Improve Registrar's office processes to use staff time effectively. (Addresses Inefficiencies #2, 7, 16)

2. Status of goal:

   □ Completed  □ Eliminated  □ Modified  ☒ In Process  □ New

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

   Click here to enter text.

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

4. If eliminated or modified, state reason:

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

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

5. Type of goal:

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

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

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

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

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

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

Theme 7: Strategic Enrollment Management in Year 1 USAP report identified the need for integrated programs, practices, policies and planning related to SEM. This goal addresses systems in EM which are not up-to-date and/or inefficient.

The eLearning system, Blackboard, currently offers an interface from the grade book functionality submitting final grades directly into the Banner student system. Analysis and review of this functionality needs to be completed. If implemented, faculty would have the option to automatically load grades from Blackboard directly into Banner. For faculty utilizing the grade book functionality, this would be a significant time saver and potential decrease in late grade submissions.

In 2013, the Indiana General Assembly passed HEA 1348-2013 which established a requirement that public institutions provide a degree map to all first-time full-time degree seeking students who enroll in the Fall 2014 or later. The act also provided a course-scheduling guarantee to these students. At this time, IPFW cannot state with confidence of being in compliance with this Indiana law. Because of this non-compliance, the VCAA office has mandated campus wide use of the software, Degree Works (myBLUEprint), and made a commitment to centralize degree certification within the registrar’s office.

IPFW currently utilizes the Purdue West Lafayette systems, SAP, to track faculty human resources data; however, faculty information must also be entered into the Banner student system in order to assign faculty to course sections and as advisors. An interface between SAP and the Banner system would streamline the process, eliminate manual data entry and decrease the instances of duplicate id creation.

Workflow is a common practice in streamlining and communicating processes such as course withdraws, grade changes, and student holds. IPFW currently owns the Banner workflow product; however, resources have never been allocated to implement. Workflow processes could greatly impact communication and efficiency across campus.

With the inclusion of course academic history almost 10 years ago for all students from other IU and Purdue campuses into the IPFW Banner system, it is time to turn on the automated process to progress students through class standing (freshman to sophomore, sophomore to junior, etc.). Currently, staff in the academic departments
must manually review student records and make class standing updates prior to registration each semester. An automated process exists in Banner; however, before it can be implemented, analysis and programming changes must be made to every Cognos report and IT process using class standing. Allocating an SIS business analyst and IT programmer analyst to address these changes would streamline the class standing process and save time for multiple staff on campus.

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

Full implementation of the Degree Works (action item #3) has progressed due to the state law which mandated providing 4-year degree plans to all first-time full-time high school students. Additionally, the VCAA office has mandated campus wide use of the software and is identifying funding to hire a full-time staff member to centralize all degree certifications to the registrar’s office (action item #4).

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

1. Implement a room scheduling software (see Goal 1)
2. Activate the interface between Blackboard and Banner for faculty grade submission
3. Continue to implement Degree Works functionality to improve service to students and the campus community
4. Centralize degree certification to the Registrar’s office
5. Implement an interface between WL human resources SAP system to IPFW Banner to Automate Employee load
6. Implement Banner Workflow in student withdraws, grade changes, holds, and other business needs
7. Automate class standing updates (Freshman, Sophomore, etc.) in the Banner student system.

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

1. **Implement a room scheduling software (see Goal 1, Action #3):**

   **Metrics:** No classroom scheduling conflicts; classes are scheduled in rooms with adequate seating, technology and ADA accommodations; timely room change notifications.

   **Performance Measures:** Reports which provide data which shows high space utilization during all class times, identify deficiencies in class patterns usage and answer questions regarding rooms which may need upgrades based on usage.

2. **Activate the interface between Blackboard and Banner for faculty grade submission:**

   **Metrics:** Analyze business need and write specifications, prioritize as an IT project, activate interface in a test system, validate data, move to Banner PROD system.

   **Performance Measures:** Monitor number of faculty utilizing Blackboard grade book and uploading grades into Banner with a goal of increased participation each semester.

3. **Continue to implement Degree Works functionality to improve service to students and the campus community:**

   **Metrics:** Analyze business need and write specifications, prioritize as an IT project, activate interface in a test system, validate data, move to Banner PROD system.

   **Performance Measures:** Monitor number of advisors and students utilizing DW software, percentage of degree audits generated, what-if degree audits generated and program plans assigned to students, with a goal of increased usage in all categories.

4. **Centralize degree certification to the Registrar’s office:**

   **Metrics:** Analyze business need to centralize degree processing that includes staffing needs, seek campus support to centralize processing, write position description and secure funding, hire staff, train in Degree Works software and transition all processing from academic units to registrar’s office.

   **Performance Measures:** Percentage of degree audits processed error free. Processing time from application to graduate to communication with student of degree completion status. No errors in NCAA APR annual report for athletes. Percentage of students utilizing student degree plans.

5. **Implement an interface between WL human resources SAP system to IPFW Banner to automate employee data information load:**
**Metrics:** Analyze business need and write specifications, prioritize as an IT project, activate interface in a test system, validate data, move to Banner PROD system.

**Performance Measures:** Percentage of new faculty loaded and assigned to class sections on the first day of the term with a goal of 100% to avoid data errors at the beginning of a semester.

6. **Implement Banner Workflow in student withdraws, grade changes, holds and other business needs:**

**Metrics:** Analyze business need and write specifications, prioritize as an IT project, activate workflows in a test system, validate data, move to Banner PROD system.

**Performance Measures:** Automation of student withdraws, grade changes and holds, including communication to all stakeholders electronically.

7. **Automate class standing updates (Freshman, Sophomore, etc.) in the Banner student system.**

**Metrics:** Analyze business need and write specifications, prioritize as an IT project, activate automated class standing in a test system, validate data, move to Banner PROD system.

**Performance Measures:** Automation of class standing saves hours of staff time to all stakeholders in the academic units.

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

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

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

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?

Unable to accomplish the actions in this goal without IT services, SIS business analyst resources (see SIS USAP report) and additional staffing to centralize degree certification.

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.

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<th>CUL - # of positions needed</th>
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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?

**Funding for a full-time SIS business analyst can implement, support and maintain the initiatives listed in this goal (see SIS USAP report), provided IT Services support is allocated.**

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

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

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

**Cooperation and resources from WL campus to interface SAP with IPFW Banner system.**
### RUBRIC

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

### TASK FORCE COMMENTS AND/OR QUESTIONS:

19. What is your timeline for accomplishing this goal?

3-5 years

Dates: Complete by December 2019

### 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:

   Implement an enrollment services center to support a strategic enrollment plan that integrates programs, policies and planning functions of the registrar and financial aid offices (this is a collaborative goal with the financial aid office).

2. Status of goal:

   □ Completed    □ Eliminated    □ Modified    □ In Process  ☒ New

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

   Click here to enter text.

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

4. If eliminated or modified, state reason:

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

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

5. Type of goal:

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

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

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

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

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

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

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

Currently, over 60% of the enrolled student population is required to interact with the registrar and financial aid offices when making changes to enrollment or when seeking advice about making changes to enrollment. Merging the offices will increase efficiency of staff in both offices creating a single point of contact. An enrollment services center or “Mastodon Hub” will serve as a model students expect and experience from other similar institutions such as the University of Toledo, Bowling Green State University, and Youngstown State University and will provide extended hours to the 8% of classes meeting after 5:00 p.m. impacting approximately 3,500 students on campus in the evenings. An additional benefit of an enrollment services center model is the creation of a cross-functional team that shares critical business knowledge which reduces dependency on any one individual staff member.

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. Merge Offices and create cross-functional teams.
2. Review all documentation of business processes and update documents and website.
3. Complete a business process analysis to identify potential improvements. Analyze the current state of processing and design a desired state.
4. Review current employee job structure and job descriptions.
5. Cross train staff.
6. Communication of merged offices in the ESC model and publicize services students can complete in model.
7. Marketing new services in the “Mastodon Hub”.

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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?

1. Current staffing is 11 in the IPFW registrar’s office. Increase staffing by two full-time positions. Based on AACRAO Registrar Office Staffing benchmark study of April 2015, the average staff size for a registrar’s office is 18 for an institution with student enrollment of 10,000-19,999.

   http://www.aacrao.org/docs/default-source/PDF-Files/aacrao-april-2015-registrar-staffing-sizeBA3038FB0C5C.pdf?sfvrsn=2

2. Complete a business process analysis of all functions in the office and modify or create new processes. Cross-train staff to meet requirements in new model. – May 2016

3. Update and revise process documentation and websites. Determine if shared website is needed for some information. – July 2016

4. Review and update job descriptions to integrate functions across registrar and financial aid areas. – May 2016

5. Offices fully integrated. – August 2019

| 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.

Upgrading one clerical position to administration to manage the enrollment services center front desk requesting ($13K) and upgrading a clerical position to ESC advisor to Operations Technical requesting ($7K). Reallocating half of the job duties of one administrative Associate Registrar to absorb centralized degree certification for all academic departments. The reallocation of the job duties is only possible if additional requested (2) staff members is approved.

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

Without additional staffing, an enrollment services center will be unsuccessful in meeting the plan 20/20 goals and will actually decrease our ability to provide current services.

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>
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<tr>
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<tr>
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<td>Select Yes/No</td>
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<tr>
<td>Non Recurring</td>
<td>Select Yes/No</td>
<td>$$:</td>
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</table>
17. If you were to receive the additional resources outlined in question #16, how will they be used?

Create two positions titled “Enrollment Services Center Advisor” at $32K each ($64K total). See question #14 above for explanation of additional $20K.

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?

- Offices that provide core functions of the university that need to be incorporated into the enrollment services center to fully support and integrate enrollment services to students.

- Physical space is slated for renovation (Kettler Hall, 1st floor west wing) in summer 2016 without a commitment for additional financial and human resources.
19. What is your timeline for accomplishing this goal?

3-5 years

Dates: Fully implemented by August 2019

---

**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:**

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**RUBRIC**

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

---

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

New Goals for 2015-2016 - #2

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

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

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

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

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

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

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

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

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

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

Click here to choose.

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

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

Click here to enter text.

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

Click here to enter text.

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

**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.

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

| S & E — Recurring | $\$: Click here to enter amount. |
| Non Recurring     | $\$: Click here to enter amount. |

| Equipment — Recurring | $\$: Click here to enter amount. |
| Non Recurring        | $\$: 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 - #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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<th>3rd Plan 2020 Goal</th>
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<th>Area IV Goals</th>
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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.

<table>
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<tbody>
<tr>
<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.

<table>
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<tr>
<th>RUBRIC</th>
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<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>
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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.
17. If you were to receive the additional resources outlined in question #16, how will they be used?

Click here to enter text.

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

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

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

Click here to choose.

Dates: Click here to enter text.

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

1. Enter a unit goal:
   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.

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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?

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.

| 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.

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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>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.

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

TASK FORCE COMMENTS AND/OR QUESTIONS:

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

Click here to enter text.

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

TASK FORCE COMMENTS AND/OR QUESTIONS:

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

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

   Click here to enter text.

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

   Click here to enter text.

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

   Click here to enter text.

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

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

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

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

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

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

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

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

Click here to enter text.

<table>
<thead>
<tr>
<th>RUBRIC</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Are clearly stated budget plans included for each goal?</strong> (A budget plan is considered ‘clearly stated’ if it includes an amount and the funding source.)</td>
</tr>
</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>
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<tbody>
<tr>
<td><strong>Are clearly stated challenges identified for each goal?</strong> (A challenge is ‘clearly stated’ if it is explained in detail along with a contingency plan to overcome the challenge). May not pertain to each goal.</td>
</tr>
</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>
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<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>
</tbody>
</table>

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