

# Instructions for USAP report-writers

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## Overview

Each unit will use Prioritization Plus software to enter the information on this report. All information should be submitted and approved by your supervisor (Director, Dean, or VC) by December 31, 2014. The task force will review and analyze each submission and will issue a report with recommendations to the Chancellor by April 1, 2015. At the start of the 2015-2016 school year, units will review and report on the previous year's goals while creating new goals. This process will continue to repeat, with task force members rotating off the committee and new members joining each year to conduct the review and analysis. This is the first year of a cyclical process. Next year's process will be fully established after we develop a baseline and better understand our needs moving forward.

Preparing the report is a collaborative process, and individual units will receive feedback from the task force about their review. They may be asked for more information or clarification. Also, your Dean or Departmental Supervisor will need to review and approve before final submission. Many units will find it most effective to use the MS Word doc template to prepare the report and then copy/paste into the software. Approvers can make changes to the report before approval and should inform the unit lead if this occurs.

Resources on goal setting, establishing metrics, and the software can be found at [www.ipfw.edu/usap](http://www.ipfw.edu/usap).

## **General Instructions**

1. Please do not leave blank cells. Write "NA" or "not applicable" instead.
2. Use simple language, with a minimum of jargon. All acronyms should be spelled out at first use.
3. Some questions have a word limit. Brevity is appreciated. Use of bullet points is encouraged.

## **Part I. The Unit "Snapshot"**

Questions 1-7 aim at getting a sense of the past and present of your unit: who you are, what you have accomplished recently, what constraints you operate under, and so forth. Because the main focus of the USAP process is on the future, think of this section as an overview; for example, bulleted lists of recent accomplishments are fine, because you should focus most of your effort on creating clear goals, metrics, and timelines that will move your unit forward.

Most of the questions in the Unit Snapshot section are self-explanatory, but a few require clarification or explanation:

**Question 1. “How does your mission support the mission of the university? This may include your mission and vision statements.”**

You may cut and paste the mission/vision statements that your unit already has created, or you may simply describe in your own words what your department/unit does.

**Question 6. “On what activities, if any, do you spend resources (money, time, people, etc.) inefficiently or in ways that do not support the mission of your unit or the university? List as many as apply.”**

Sometimes a department or unit devotes time and/or money to a task that they don't believe is central to their mission or focus, but they do it because someone wanted them to in the past. We are asking this question because if your department/unit is doing something not aligned with your own mission, and you don't think it benefits your unit or the university, we'd be interested to know about it.

**Question 7. “Upon review of your IR departmental profile and FY 2014-15 Budget, are there any data you want to correct or contextualize?”**

All units are encouraged to review their department profiles found on the Institutional Effectiveness website (<http://www.ipfw.edu/offices/ir/profiles/>); these profiles provide budget data for each unit in addition to student enrollment and graduation data for academic units. The departmental profiles present a lot of data, but not a lot of context. Are there mitigating circumstances or ways that the IR office slices the data that affect the interpretation of the data? Do you see an error? If so, this is the place to provide that contextualization or correction. If there are other data you use as performance metrics, such as field standards, you might consider discussing that information here as well.

## **Part II. Unit Goal Reports**

**Setting Goals and Metrics:** Most administrative and academic units have goals of some kind. In this section, you will identify your unit goals and tell us how they align to the IPFW Strategic Plan 2020, how they are measured, and what resources you need to meet them.

### **1. Enter a unit goal:**

Creating goals means thinking about the future and how to convert the IPFW strategic goals into specific performance targets that help us achieve our mission. You should have no more than 3 to 5 high-priority goals, and you can include other goals that are important to your unit. Each goal should be a SMART goal (Specific, Measurable, Achievable, Relevant, and Timely). Doing this provides direction that will help you focus and advance while also giving you a way to measure your progress.

**2. What 2020 goal(s) does this unit goal align with? List as many as apply. If it does not align, you may write “NA” or clarify.**

Using the Plan 2020 Coding document, available on [www.ipfw.edu/usap](http://www.ipfw.edu/usap) under “Unit Reporting,” identify which goal(s) align with your unit goal. *Please type in both the Code and the 2020 goal.* NOTE: Any unit responsible for student learning (whether the unit is academic or academic support) should include at least ONE unit goal (among its other goals) that aligns with the IPFW goal of improving measurement of student learning – Goal I.A.1 or I.A.2.

You may find that your unit goal aligns to multiple Plan 2020 goals and at different levels, and that is fine. List each code with text on a separate line. Choose the goal 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.

**3. Is the unit goal high, medium, or low priority? Limit your high-priority unit goals to 3 to 5.**

Identifying the priority level of the goal will help us better understand the primary focus of your unit. Creating too many high-priority goals makes it increasingly difficult to achieve any of them. You can report more than 3 to 5 goals but need to clarify the level of priority here.

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

How will you accomplish your goal? Action items should indicate your plan for progressing towards your goal. Consider the steps you need to take between now and next year (or achievement of the goal, if the timeline is longer than one year) to be successful.

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

Metrics are the criteria that show the impact of your work. They may be quantifiable or qualitative, but they are observable in some way. Metrics should tell you if you achieved the results you expected. The measures themselves should reflect the purpose, mission, and hopes of the unit or department. Metrics are also known as “measures of success” or “key performance indicators.”

**6. Are you able to accomplish this unit goal with your current resources?**

Yes or No

**7. If no, what additional resources do you need to accomplish this unit goal?**

Provide information about the resources you need to successfully meet this goal. Consider all resources – people, financial, physical, or knowledge.

**8. What challenges, other than financial resources, might affect your progress toward accomplishing this unit goal?**

Recognizing that most units would report financial constraints to their operations, we want to know what other challenges may affect your ability to meet this goal. Consider internal operations and processes within your own department or college as well as throughout the institution. What might prevent you from achieving this goal?

**9. If achieving this unit goal will take longer than one year, what is your timeline for implementing and accomplishing it?**

Clarify the timeline for goals that will take more than a year, indicating especially what steps of the goal you expect to have accomplished in a year.