Program Summary

Task Force: Thank you for the time and effort you put forth in your report. Through the USAP process, we are working to create a culture of continuous improvement; setting specific and measurable goals is an important step in the process of moving IPFW toward this culture of improvement. Part of this effort is getting individuals and units at IPFW to think differently about planning and the future. The work of the IPFW Foundation is critical to IPFW and we greatly appreciate the time you spent on this significant endeavor. Thank you again for being part of this important initiative. Nice report!

Criterion: #1: Mission - How does your unit support the mission of the university? This may include your mission and vision statements. (no more than 200 words)

Question: Mission - How does your unit support the mission of the university? This may include your mission and vision statements. (no more than 200 words)

The Mission of the IPFW Foundation is to provide support for Indiana University-Purdue University Fort Wayne with Program Development, Scholarships, and Campus Development.

Criterion: #2: Accomplishments - Please list significant accomplishments from the last three years as they align with Plan 2020 goals

Question: I. Foster Student Success - Please list significant accomplishments from the last three years as they align with Plan 2020 goal area I: Foster student success.

N/A

Question: II. Creation of Knowledge - Please list significant accomplishments from the last three years as they align with Plan 2020 goal area II: Promote the Creation, Integration, and Application of Knowledge.

Promote the Creation, Integration, and Application of Knowledge

Promote mentoring relationships between faculty and students engaged in creation, integration, and application of knowledge:

• The Foundation purchased the TLC Child Care Center to both provide day care opportunities for students and staff, and to provide a venue for Education students to obtain hands on experience.
• The Foundation funded renovations to the Holiday Inn kitchen to provide for a classroom environment at that facility for students in the Hotel, Restaurant, and Tourism Management Program.
III. Regional Hub - Please list significant accomplishments from the last three years as they align with Plan 2020 goal area III: Serve as a Regional Intellectual, Cultural, and Economic Hub for Global Competitiveness.

N/A

**Question:** IV. - Create a Stronger Univ - Please list significant accomplishments from the last three years as they align with Plan 2020 goal area IV: Create a Stronger University through Improving the Support of Stakeholders and the Quality and Efficiency of the Organization.

Creating a Stronger Univ. through Improving the Support of Stakeholders and the Quality and Efficiency of the Organization

- During the last several years the IPFW Foundation has worked to be more autonomous from the Purdue Research Foundation. Tasks that are now done locally instead of in W. Lafayette include the filing of the IRS Form 990, Indiana Business Entity Report, Preparation of 1099's, and the completion of annual financial statements that are presented to the foundations board of directors.
- The foundation has supported several student endeavors by providing financial support for the purchase of equipment, facilities and learning materials.
- The foundation has continued to receive clean audit reports from Purdue's Internal Audit Department. Internal Audit evaluates the procedures used to process receipts and disbursements, record financial transactions and preparation of the financial statements.

**Question:** Other Accomplishments - Please list any other significant accomplishments from the last three years that do not align with Plan 2020.

N/A

**Criterion:** #3: Accreditations - Program specific accreditation and status

**Question:** Accreditations - What program-specific accreditations and status do you have, if any?

N/A

**Question:** Constraints/Benefits - How do these accreditations constrain or benefit the work of your unit, if applicable?

N/A

**Criterion:** #4: Laws and Mandates - Federal and state laws or mandates that your unit addresses

**Question:** Federal and State Laws - What federal and/or state laws or mandates do you address, if any?
The IPFW Foundation is a separate legal entity from the university. The Foundation has its own Federal Tax ID and is required to file an IRS Form 990, Return of Organization Exempt From Income Tax, on an annual basis.

**Question:** Constraints/Benefits - How do these federal and state laws or mandates constrain or benefit the work of your unit?

The IRS Form 990 is very time intensive to prepare and submit each year. Since the Foundation only has one employee the form preparation requires that some day to day tasks are put on hold. This sometimes impacts stakeholders in that foundation reports and access to check disbursements are sometimes delayed.

**Criterion:** #5: Inefficiencies - Activities that you spend resources on inefficiently or in ways that do not support the mission.

**Question:** Inefficient use of resources - 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.

N/A

**Criterion:** #6: IR and Budget Review - Review of your department profile and budget

**Question:** Contextualize IR data - Upon review of your IR Department Profile (for academic units) and FY 14-15 Budget information, are there any data you want to correct or contextualize? To view your profile or budget visit the Office of Institutional Effectiveness website: http://www.ipfw.edu/offices/ir/profiles/

N/A

**Criterion:** #7: Goal One - In this criterion, you will identify your unit goals and tell us how they align to Plan 2020, how they are measured, and what resources you need to meet them.

**Task Force:**
1. Comment on the specificity of the goal:

High

2. Comment on the goal's measures:

Very clear, although would benefit from stating whether “all” reports are being managed and distributed

3. Comment on the unit’s ability to achieve the goal (include a consideration of the departmental profile and budget data):

Highly likely

4. Comment on the goal’s relevance:

High

5. Comment on the timeline of the goal:

Looks great

Possible opportunities for collaboration or suggestions for addressing a gap:

* Campus constituents and business managers with endowments for budget management tasks
* Budget Director for annual budgeting purposes
* Development or Office of Advancement to share a staff member (if it’s not already happening)

**Question:** Unit Goal - What is your unit goal?

Provide reports to the campus community on status and performance of Foundation accounts.

Develop a consistent set of reports that can be distributed to the Chancellor, Vice-Chancellors, Deans and Department Heads showing relevant foundation account information that can be used in conjunction with the annual budget process.

**Question:** IPFW Goal - 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.

IV.B.5. Continue increasing transparency in resource allocation budget formation and administration, and personnel decisions

Create a Stronger University through Improving the Support of Stakeholders and the Quality and Efficiency of the Organization

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

**Question:** Actions - What action(s) does your unit plan to take to support this unit goal?

- Create mock reports to present to Chancellor, Vice Chancellor's, Deans and Departments Heads
- After receiving approval from the above on format, work on programming requirements to achieve desired reports
- Test and implement new reports
- Distribute reports to stakeholders on a monthly basis

**Question:** Metrics - With what metrics will you assess progress toward accomplishing this unit goal on an annual basis?

- Have new reports been created
- Are reports being distributed to stakeholders on a monthly basis

**Question:** Resources - Are you able to accomplish this unit goal with your current resources?

- May require programming from Purdue Research Foundation (the IPFW Foundation uses PRF's accounting system, aka IFAS).
- The funds to pay for this programming could come directly from the foundation and would not require university funds.

**Question:** Needed Resources - If you don’t have enough resources, what additional resources do you need to accomplish this unit goal?

N/A

**Question:** Challenges - What challenges, other than financial resources, might affect your progress toward accomplishing this unit goal?

The foundation currently only has one employee. Finding the time to work on this project within the current constraints of daily tasks and projects is the only foreseeable challenge.

**Question:** Timeline - If achieving this unit goal will take longer than one year, what is your timeline for implementing and accomplishing it?

This goal can be accomplished by 7/1/2015.

**Criterion:** #8: Goal Two - In this criterion, you will identify your unit goals and tell us how they align to Plan 2020, how they are measured, and what resources you need to meet them.

**Task Force:**
Indiana University-Purdue University Fort Wayne (IPFW)
Program Write-up with Task Force Comments

FOUN IPFW Foundation

1. Comment on the specificity of the goal:
   High

2. Comment on the goal's measures:
   Very clear

3. Comment on the unit’s ability to achieve the goal (include a consideration of the departmental profile and budget data):
   Highly likely

4. Comment on the goal’s relevance:
   High

5. Comment on the timeline of the goal:
   Appropriate

Possible opportunities for collaboration or suggestions for addressing a gap:

Purdue Research Foundation to review existing manuals, policies, and procedures

**Question:** Unit Goal - What is your unit goal?

Create a manual with documentation for all tasks and procedures for the IPFW Foundation.

**Question:** IPFW Goal - 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.

IV.B. Process Goals: Efficiency

Create a Stronger University through Improving the Support of Stakeholders and the Quality and Efficiency of the Organization

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

High Priority

**Question:** Actions - What action(s) does your unit plan to take to support this unit goal?

- Acquire all current documentation of tasks and verify that all information is up to date.
- Create documentation for all current undocumented tasks.
- Assemble in a hard copy manual as well as an online version that can be stored on Vibe.
FOUN IPFW Foundation

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

- Manual created and updated
- Vibe updated with electronic version

**Question:** Resources - Are you able to accomplish this unit goal with your current resources?

This goal can be completed with current resources.

**Question:** Needed Resources - If you don't have enough resources, what additional resources do you need to accomplish this unit goal?

N/A

**Question:** Challenges - What challenges, other than financial resources, might affect your progress toward accomplishing this unit goal?

- Time

**Question:** Timeline - If achieving this unit goal will take longer than one year, what is your timeline for implementing and accomplishing it?

This goal can be accomplished by 12/31/2015.

**Criterion:** #9: Goal Three - In this criterion, you will identify your unit goals and tell us how they align to Plan 2020, how they are measured, and what resources you need to meet them.

**Task Force:**
1. Comment on the specificity of the goal:
   High

2. Comment on the goal's measures:
   Very clear

3. Comment on the unit’s ability to achieve the goal (include a consideration of the departmental profile and budget data):
   Highly likely

4. Comment on the goal’s relevance:
   High

5. Comment on the timeline of the goal:
   Appropriate

Possible opportunities for collaboration or suggestions for addressing a gap:

**Question:** Unit Goal - What is your unit goal?

Have an external audit of the foundations financial statements and processes.

**Question:** IPFW Goal - 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.

IV.B.5. Continue increasing transparency in resource allocation budget formation and administration, and personnel decisions

Create a Stronger University through Improving the Support of Stakeholders and the Quality and Efficiency of the Organization

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

Medium Priority

**Question:** Actions - What action(s) does your unit plan to take to support this unit goal?

- Get approval from the IPFW Foundation Board of Directors to proceed with an External Audit
- Put out a Request For Proposal to local accounting/auditing firms
- Choose a firm to conduct an audit and establish a timeline with the chosen firm

**Question:** Metrics - With what metrics will you assess progress toward accomplishing this unit goal on an annual basis?
The External Audit is completed and the results presented to the IPFW Board of Directors.

**Question:** Resources - Are you able to accomplish this unit goal with your current resources?

- Funds from the IPFW Foundation to pay for the external audit

**Question:** Needed Resources - If you don’t have enough resources, what additional resources do you need to accomplish this unit goal?

- May require temporary help to produce documents (audit trails of expenditures, bank statements, procedural manuals, historical documents, etc).

**Question:** Challenges - What challenges, other than financial resources, might affect your progress toward accomplishing this unit goal?

- Time
- Cost

**Question:** Timeline - If achieving this unit goal will take longer than one year, what is your timeline for implementing and accomplishing it?

This goal can be accomplished by 8/30/2016.

**Criterion:** #10: Goal Four - In this criterion, you will identify your unit goals and tell us how they align to Plan 2020, how they are measured, and what resources you need to meet them.

**Question:** Unit Goal - What is your unit goal?

**Question:** IPFW Goal - 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.

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

**Question:** Actions - What action(s) does your unit plan to take to support this unit goal?

**Question:** Metrics - With what metrics will you assess progress toward accomplishing this unit goal on an annual basis?
**Question:** Resources - Are you able to accomplish this unit goal with your current resources?

**Question:** Needed Resources - If you don’t have enough resources, what additional resources do you need to accomplish this unit goal?

**Question:** Challenges - What challenges, other than financial resources, might affect your progress toward accomplishing this unit goal?

**Question:** Timeline - If achieving this unit goal will take longer than one year, what is your timeline for implementing and accomplishing it?

**Criterion:** #11: Goal Five - In this criterion, you will identify your unit goals and tell us how they align to Plan 2020, how they are measured, and what resources you need to meet them.

**Question:** Unit Goal - What is your unit goal?

**Question:** IPFW Goal - 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.

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

**Question:** Actions - What action(s) does your unit plan to take to support this unit goal?

**Question:** Metrics - With what metrics will you assess progress toward accomplishing this unit goal on an annual basis?

**Question:** Resources - Are you able to accomplish this unit goal with your current resources?
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**Question:** Needed Resources - If you don’t have enough resources, what additional resources do you need to accomplish this unit goal?

**Question:** Challenges - What challenges, other than financial resources, might affect your progress toward accomplishing this unit goal?

**Question:** Timeline - If achieving this unit goal will take longer than one year, what is your timeline for implementing and accomplishing it?

**Criterion:** #12: Goal Six - In this criterion, you will identify your unit goals and tell us how they align to Plan 2020, how they are measured, and what resources you need to meet them.

**Question:** Unit Goal - What is your unit goal?

**Question:** IPFW Goal - 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.

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

**Question:** Actions - What action(s) does your unit plan to take to support this unit goal?

**Question:** Metrics - With what metrics will you assess progress toward accomplishing this unit goal on an annual basis?

**Question:** Resources - Are you able to accomplish this unit goal with your current resources?

**Question:** Needed Resources - If you don’t have enough resources, what additional resources do you need to accomplish this unit goal?
| Question: Challenges - What challenges, other than financial resources, might affect your progress toward accomplishing this unit goal? |

| **Question:** | Timeline - If achieving this unit goal will take longer than one year, what is your timeline for implementing and accomplishing it? |

**Criterion:** #13: Goal Seven - In this criterion, you will identify your unit goals and tell us how they align to Plan 2020, how they are measured, and what resources you need to meet them.

| **Question:** | Unit Goal - What is your unit goal? |

| **Question:** | IPFW Goal - 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. |

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

| **Question:** | Actions - What action(s) does your unit plan to take to support this unit goal? |

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

| **Question:** | Resources - Are you able to accomplish this unit goal with your current resources? |

| **Question:** | Needed Resources - If you don’t have enough resources, what additional resources do you need to accomplish this unit goal? |

| **Question:** | Challenges - What challenges, other than financial resources, might affect your progress toward accomplishing this unit goal? |
Timeline - If achieving this unit goal will take longer than one year, what is your timeline for implementing and accomplishing it?

**Criterion:** #14: Goal Eight - In this criterion, you will identify your unit goals and tell us how they align to Plan 2020, how they are measured, and what resources you need to meet them.

**Question:** Unit Goal - What is your unit goal?

**Question:** IPFW Goal - 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.

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

**Question:** Actions - What action(s) does your unit plan to take to support this unit goal?

**Question:** Metrics - With what metrics will you assess progress toward accomplishing this unit goal on an annual basis?

**Question:** Resources - Are you able to accomplish this unit goal with your current resources?

**Question:** Needed Resources - If you don’t have enough resources, what additional resources do you need to accomplish this unit goal?

**Question:** Challenges - What challenges, other than financial resources, might affect your progress toward accomplishing this unit goal?

**Question:** Timeline - If achieving this unit goal will take longer than one year, what is your timeline for implementing and accomplishing it?
#15: Goal Nine - In this criterion, you will identify your unit goals and tell us how they align to Plan 2020, how they are measured, and what resources you need to meet them.

**Question:** Unit Goal - What is your unit goal?

**Question:** IPFW Goal - 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.

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

**Question:** Actions - What action(s) does your unit plan to take to support this unit goal?

**Question:** Metrics - With what metrics will you assess progress toward accomplishing this unit goal on an annual basis?

**Question:** Resources - Are you able to accomplish this unit goal with your current resources?

**Question:** Needed Resources - If you don’t have enough resources, what additional resources do you need to accomplish this unit goal?

**Question:** Challenges - What challenges, other than financial resources, might affect your progress toward accomplishing this unit goal?

**Question:** Timeline - If achieving this unit goal will take longer than one year, what is your timeline for implementing and accomplishing it?

**Criterion:** #16: Goal Ten - In this criterion, you will identify your unit goals and tell us how they align to Plan 2020, how they are measured, and what resources you need to meet them.
**Question:** Unit Goal - What is your unit goal?

**Question:** IPFW Goal - 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.

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

**Question:** Actions - What action(s) does your unit plan to take to support this unit goal?

**Question:** Metrics - With what metrics will you assess progress toward accomplishing this unit goal on an annual basis?

**Question:** Resources - Are you able to accomplish this unit goal with your current resources?

**Question:** Needed Resources - If you don’t have enough resources, what additional resources do you need to accomplish this unit goal?

**Question:** Challenges - What challenges, other than financial resources, might affect your progress toward accomplishing this unit goal?

**Question:** Timeline - If achieving this unit goal will take longer than one year, what is your timeline for implementing and accomplishing it?