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 Accounting and Fiscal Systems 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.

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)

Task Force: 

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 Accounting Services is to provide the IPFW community with accurate, relevant, needed and useable financial information and services, in an efficient, effective and timely manner.

As we strive to achieve this mission, Accounting Services will:

- adhere to the highest professional and ethical standards in all our dealings;
- exercise honesty, diligence, and objectivity in all our activities;
- safeguard the integrity of confidential or proprietary information entrusted to us;
- treat everyone with courtesy, respect, and understanding;
- encourage our employees to grow in knowledge and experience; and
- use technology and knowledge to constantly improve the quality of our work.

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.

1. Accounting Services fosters student success by assisting students with curricular and extra-curricular travel arrangements and processing of student financial aid payments.
2. In the past three years, Accounting Services has worked with Financial Aid and the Bursar’s Office to revise the process of making student scholarship and award payments.

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.

Accounting Services promotes the creation, integration, and application of knowledge by providing accounting, payables, and travel support to faculty engaged in research and instruction.
**Question:** 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.

*Not Applicable*

**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.

1. *In general, Accounting Services creates a stronger university by providing accounting, payables, and travel management services to all university departments as efficiently and effectively as possible. We process accounting, payables, and travel transactions at a level of volume that gives us expertise that departmental employees cannot expect to achieve. This centralization allows for the efficient and accurate processing of transactions with a minimum of disruption and anxiety to departments.*

2. *In 2013-14, Accounting Services provided implementation support for Purdue’s new travel and expense management program. This involved the streamlining of travel approvals and reimbursements, and the implementation of a travel card program.*

3. *In 2012-13, Accounting Services began providing data entry on certain direct payments to vendors that had previously been performed by the Accounts Payable department at Purdue, allowing us to improve consistency and data entry accuracy on these payments.*

4. *On a continuous basis, Accounting Services uses its property accounting role to assist Physical Plant, individual departments and the university as a whole in repurposing and disposing of surplus equipment in a manner that is environmentally safe and financially beneficial.*

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

*No other accomplishments.*

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

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

*Accounting Services has no program-specific accreditations.*

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

*Not applicable.*

**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?

*Accounting Services has responsibility for ensuring compliance with a number of federal and state statutes and regulations, primarily related to income and sales tax. In addition, we support the University in complying with OMB Circular A-21 “Cost Principles” for Educational Institutions”, and OMB Circular A-133,”Audits of States, Local Governments, and Non-Profit Organizations”, which form the foundation for most university policies and procedures pertaining to expenditure of university funds.*

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

*On one hand, these external mandates constrain the work of our unit by requiring us to review all expenditures for compliance with their requirements. On the other hand, these mandates benefit the University by setting a high standard for transparency, consistency, and ethics in business practices.*

**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.

1. *Potentially duplicative review of documents also being reviewed upstream and downstream in the document processing workflow.*
2. *Extensive photocopying of original documents for purposes of review and recreation.*

**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/

*Not Applicable*

**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:**

The goal is clear and specific directly addressing one the inefficiencies noted in Part One.

2. **Comment on the goal's measures:**

The Metric will be lowering of duplication costs and will be measurable against previous expenditure reports.

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

Considering that IPFW is moving toward becoming a paperless institution, the goal is a first step in moving toward that direction and therefore must be achieved.

4. **Comment on the goal's relevance:**

Considering that IPFW is moving toward becoming a paperless institution, the goal is a first step in moving toward that direction and therefore must be achieved.

5. **Comment on the timeline of the goal:**

Appropriate

Possible opportunities for collaboration or suggestions for addressing a gap: n/a

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

Reduction of printing and duplicating expenses by 25%.

**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. 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

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

We are utilizing low-cost scanning technology and network storage as an alternative.

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

Monthly copier expenditures will be the metric.

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

Yes

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

None

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

Employees will need to learn how to using scanners and imaging software. There may also be some resistance to change.

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

**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:**
1. Comment on the specificity of the goal:
   The goal is somewhat specific.

2. Comment on the goal's measures:
   How would this percentage be determined?

3. Comment on the unit's ability to achieve the goal (include a consideration of the departmental profile and budget data):
   Given that it requires collaboration with Purdue Financial Systems, and IPFW card holding units, it may be difficult to achieve.

4. Comment on the goal's relevance:
   It is a medium level priority for AFS so although it seems to be a relevant, it also does not seem to be a priority.

5. Comment on the timeline of the goal:
   No timeline was listed.

   Possible opportunities for collaboration or suggestions for addressing a gap:

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

Streamline purchasing card reconciliation and recharge through utilization of default cost assignments on all purchasing cards.

**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. 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

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

I have submitted a proposal to West Lafayette requesting permission to implement departmental default cost assignments to each purchasing card that only need to be changed if the default does not accurately reflect the transaction.

**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?

No.

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

Project requires buy-in from Purdue Procurement and Accounts Payable to implement.

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

Cooperation of card holding departments.

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

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:

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?
Program Write-up with Task Force Comments

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: #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?

**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?
#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?

**Question:** 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?

Criterion: #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?