Program Write-up with Task Force Comments

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 Bursar’s Office 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)

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 staff of the Bursar’s Office is charged with providing a high level of competent service to various constituencies who depend on us. Accordingly, we strive to meet the expectations of:

- Our students, who rely on us to correctly assess their fees and disburse their financial aid in an expedient manner;
- The Treasurer of Purdue University, who has delegated to us a fiduciary responsibility for collecting, depositing, and accounting for university funds entrusted to us
- Governmental agencies and private donors who demand that we serve as trustworthy custodians of their funds held for the benefit of specific students
- The IPFW community at large which looks to us to provide certain ancillary banking and financial services.

At all times, we must act in a highly professional manner. We must earn and retain a reputation of fairness. Our work must be accurate and complete. We must endeavor to treat all our constituents with courtesy and concern for their needs. Above all, we must be trusted by all who deal with us.

This is our mission. Everything we do shall be done with these principles in mind."

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.
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.

Implemented Bursar staff cross training and customer service improvements

Implemented improvements in the reconciliation process for scholarships and awards

Associate Bursar led a Federal Work Study process review project with counterparts from Financial Aid, HR/Payroll and Career Services that resulted in better service to all departments on campus. This has resulted in the Bursar's office no longer being a bottleneck in the process. The departments are more educated on what is necessary for students to be able to utilize FWS funding, and students are being provided a more seamless hiring process.

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.

Supported departments' efforts in collecting payments and billing for regional events

Improved processes for third party billing of regional employers and international embassies.

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.

Expand the use of TouchNet's Marketplace uStore for additional departments' events

Question: Other Accomplishments - Please list any other significant accomplishments from the last three years that do not align with Plan 2020.
Reduced student receivables by increasing collection efforts (email, paper invoices, phone calls).

Submitted student receivables, before they were written off, to the Indiana Department of Revenue for tax intercept resulting in $800,000.00+ collected to date.

Bursar staff transitioning from using an overtaxed ACCESS database to using SAP for non-student receivables.

Compiled and sent all old outstanding receivables to attorney for further collection action.

Implemented Positive Pay for refund checks to provide additional bank account security.

Implemented improvements in the reconciliation process for scholarships and awards.

Up to date PCI Compliance for all IPFW credit card merchants.

Implemented Bursar staff cross training and customer service improvements.

Implemented improvements in the reconciliation process for scholarships and awards.

Associate Bursar led a Federal Work Study process review project with counterparts from Financial Aid, HR/Payroll and Career Services that resulted in better service to all departments on campus. This has resulted in the Bursar's office no longer being a bottleneck in the process. The departments are more educated on what is necessary for students to be able to utilize FWS funding, and students are being provided a more seamless hiring process.

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

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

NA

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

NA

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

Benefits - Student information protected.

Constraints - drives all of our processes and timelines. Limits resources that could be used for process improvements and communication.

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.
Manual processes to monitor student accounts and communicate with students and departments. This could be greatly improved by additional ITS resources. Limits our ability to modify the Banner system to our needs and external processes.

Student Account Write Offs is a manual process that takes weeks each year to perform. Other campuses in our system run a batch process to identify and make required accounting entries. This has been on the project list for numerous years.

Work study entries from SAP payroll system to Banner student system is a manual process that takes hours each pay period to perform. Other campuses in our system run a batch process to identify and make required entries against student awards. This has been on the project list for numerous years.

Brio reporting to Cognos reporting conversion has been a laborious process and has not been completed. Brio is no longer supported and data could be lost. Had additional resources in the report writing department/ITS been allocated to this project the conversion would have been completed.

There is only one individual in IPFW's report writing department who is supporting all departmental reporting across campus for Banner student information data.

Waiting to implement student organization software expanded features in myipfw. This will eliminate paper processes for student organizations and internal Bursar processes. This has been on the project list for approximately 2 years.

Recording grades and entering graduation dates in Go Army portal is not a true Bursar function. We have been making these entries from the inception of the program.

There needs to be department on campus that is responsible for all facets of student employment on campus. Currently there is no onboarding process for student employees. Departments are left to calling other departments to figure out federal work study process and how to complete HR PA forms; students do not know how to retrieve One Purdue Career Account information.

Our practices and managerial judgement is questioned by Purdue departments continually. This is inefficient in that we know the business of IPFW and our students and have created procedures in the best interest of IPFW. We spend too much time justifying how we operate to contingencies who want us to operate the same way they do.

**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/
#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:
   
   Clear; Pinpoints target audience.

2. Comment on the goal's measures:
   
   High priority goal

   Have measures in place to continue excellent standard (training and testing sessions, goal of time allotment for answering customer questions)

   QUESTION: Phone calls are only one aspect of serving students; what about other methods? Please elaborate on metrics.

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

   QUESTION: Please clarify if you need additional staff; do you need more resources?

   Notes turn over in staff positions because of low clerical pay. Other inefficiencies exist due to turnover; time is taken up hiring new personnel and training them.

4. Comment on the goal’s relevance:
   
   Relevant to Strategic #IV and campus PR towards the ‘customer’ and due to the importance of the work for the university as a whole.

5. Comment on the timeline of the goal:
   
   Ongoing-seems reasonable because this is a process vs. a project.

   Possible opportunities for collaboration or suggestions for addressing a gap:

   Possible aspects of current software which are not fully utilized because of lack of particular clerical expertise.

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

Bursar will continue to provide excellent customer service to our customers (students, parents, departments, employers) which will aid in student retention.

**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.

I.M. 1 - Foster Student Success, Retention
**Question:** Priority Level - Is the unit goal high, medium, or low priority? Limit your high-priority unit goals to 3 to 5.

High

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

Customer service and teamwork training will be delivered at least quarterly in order to keep this top of mind. We also have traveling trophies for both customer service and teamwork that are passed from front line to operations area and vice versa.

We have all taken a Strengthsfinder test and use these strengths when looking at project assignments and working together.

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

This will be measured by ensuring phone calls coming into our call queue are answered in a timely manner, no longer than a 2 minute wait time and by ensuring our transactions are processed accurately.

Feedback from other departments and limited number of complaints to leadership.

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

Yes, when fully staffed and not assigned to outside projects.

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

NA

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

Turn over of staff or lengthy medical leave of staff. Turn over often the result of lower than market pay rates at the clerical and operations level.

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

On-going annual goal

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

Specific but doesn’t seem exactly like a goal rather one of the Bursar’s tasks.

Does this mean the Bursar cannot do it right now? Why?

If Bursar right now cannot collect receivables and need to come up with a method for collection then it is a goal.

2. Comment on the goal’s measures:

High Goal

Using set pattern to measure standard.

Metrics don’t state goal of how much they would like to reduce receivable accounts; there is no specific metric.

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

Stated not attainable with current resources.

Face challenge of students not viewing their account information.

Contingent on new position.

4. Comment on the goal’s relevance:

Very relevant to an ‘income based’ university.

5. Comment on the timeline of the goal:

Stated Ongoing- Not stated as to what % decline of accounts receivable could be accomplished in what time frame.

Possible opportunities for collaboration or suggestions for addressing a gap:

Question: Unit Goal - What is your unit goal?

Bursar will effectively bill and collect student account receivables which bring in revenue to the university.

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.

Other - This supports every strategic goal of the University.

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?

Billing statements will be generated at least weekly for students who have new charges.

Effective use of the Banner Student Information System will be maintained by reviewing processes and functionality at least yearly. Sharing and learning from peers and the Ellucian specialists at the Elive conferences and bringing back new functionality or a different way to use current functionality. Keeping up-to-date with new releases and testing.

Effective use of the TouchNet eCommerce products will be maintained by reviewing processes and functionality at least yearly. Sharing and learning from peers and the TouchNet specialists at the COMTEC conference that occurs every other year. Keeping up-to-date with the new releases and testing.

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

Receivables will decrease and fewer accounts turned over for collection and tax intercept.

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

No, would need more resources to work post term collections.

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

Would need one additional FTE dedicated to collections.

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

Majority of receivables are a result of Return of Title IV financial aid funding due to students withdrawing from school. If we increase our retention rate, these receivables will naturally decline.

Challenge the importance of utilizing Bursar student account. There are many students who do not read their email, update their contact information or login to their Bursar student account.

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

On going annually
#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:

Specific and clear. Aligns with IV.B

2. Comment on the goal's measures:

High Goal

**Actions and metrics:** Focused on eliminating manual credit card transactions, primarily for academic units.

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

Stated can be achieved with current resources.

Challenges of static fees for academic workshops to cover increasing cost of services provided.

Also on units willingness to cover "extra" costs.

4. Comment on the goal's relevance:

Relevant to better focus on accounts and due to federal laws governing credit card accounts.

5. Comment on the timeline of the goal:

Stated 2016- seems reasonable.

Possible opportunities for collaboration or suggestions for addressing a gap:

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

Strengthen credit card mail-in/phone-in procedures to comply with Payment Card Industry - Data Security Standards

**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 - Efficiency

Other - Compliance with Payment Card Industry - Data Security Standards

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

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

- Eliminate mail-in/phone-in transactions for academic departmental events and supporting departmental services.
- Work with Department of Continuing Studies to provide online registrations at a minimal or no cost to the academic departments.
- Create more stores in TouchNet eCommerce software to accommodate supporting departmental services.
- Training of Business Managers and Departments in the liability issues and solutions available.
- Communication from Vice Chancellor of Academic Affairs and Vice Chancellor of Financial and Administrative Affairs to the departments.

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

- Reduce by 90% manual credit card transactions that Bursar staff need to authorize and process through SAP.

**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?

NA

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

- Academic department reluctance to increase workshop/event fees to cover additional charges for Department of Continuing Studies services.
- Academic department reluctance to relinquish control of workshop/event registration.

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

By end of fiscal year 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.
Task Force: 1. Comment on the specificity of the goal:

Seems specific, but is it a goal or a current task?

2. Comment on the goal's measures:

Medium Goal

Actions and Metrics: Unclear to whether unit is doing this now.

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

Stated not achievable with present manpower. As stated earlier, it is not clear if the intended actions would be a new layer of responsibilities.

Would be attainable with additional dedicated clerical staff.

4. Comment on the goal's relevance:

Unclear as to whether the actions are the unit's responsibility.

5. Comment on the timeline of the goal:

Started Ongoing- Not clear as to what is to be achieved.

Possible opportunities for collaboration or suggestions for addressing a gap:

Question: Unit Goal - What is your unit goal?

Bursar will ensure its fiduciary responsibilities to the University are met by reconciling accounts on a monthly basis.

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.

Other – ensures funds are allocated to the correct Accounts - to support the financial health of the university.

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?
BUR Bursar

Bursar will complete the monthly reconciliations of University bank statements to the university records for the following bank accounts:

Student Refund account (University Revolving Bank Account)

Athletics Cash Advance account (University Revolving Bank Account)

IPFW Foundation Bank Account

Student Organizations Bank Account (funds raised by 106 student organizations)

Bursar will complete the reconciliation of student information system (Banner) to the general ledger in SAP for the following:

Federal Grants and Loans (PELL, Direct Loans, SEOG, FWS, Perkins Loans)

State Grants and Scholarships (21st Century, Higher Education, National Guard Grant, CVO, Mitch Daniels Scholarship, Minority Teach Scholarship, Nursing Scholarship, etc.)

Third Party Scholarships (these scholarship come in from hundreds of companies, foundations, churches, etc.)

Private Loans

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

These accounts will be measured by accurately balancing each account to a zero outstanding balance each month. If a zero balance is not achieved, a detailed explanation of the outstanding issues is provided, and cleared the following month.

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

No, this is a very manual process.

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

Yes, additional clerk required.

Additional resources are required to assist in the re-writing of processes, to mechanize and reduce the amount of time needed to complete these tasks each month. The assistance would allow for testing and set-up of new systems or software and clean-up of prior years’ outstanding balances.

**Question:** Challenges - What challenges, other than financial resources, might affect your progress toward accomplishing this unit goal?
Communication and understanding between the Bursar's Office and any department processing financial transactions or affecting student account balances (FWS Payroll, Student Organizations, Financial Aid, Athletics, Follett's Bookstore and departmental deposits).

Time and limited resources with highly manual processes.

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

Ongoing

**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.

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

   Seems clear.

   Same question though: Is it a goal or a task of the Bursar's office?

2. Comment on the goal's measures:

   High Goal

   Alignment-Stated Other outside Strategic Goals I-IV.

   Actions and Metrics: Not clear if functions are presently being done or need improvement.

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

   Stated Yes and no additional resources needed.

   Challenge: Prioritizing

4. Comment on the goal’s relevance:

   Relevant but not clear if it is already being done.

5. Comment on the timeline of the goal:

   Stated Ongoing-Seems like process would not have an end date.

   Possible opportunities for collaboration or suggestions for addressing a gap:

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

Bursar will ensure its fiduciary responsibilities to the University are met by accurately requesting, claiming, depositing and returning of cash (cash, checks, credit cards, electronic funds), federal, state, and private funds.
**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.

Other – ensures funds are allocated to the correct Accounts - to support the financial health of the university.

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

High

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

Bursar office will preform the following Treasury type functions to support the health of our university's finances:

We will accurately claim and deposit into the correct IPFW general ledger accounts (SAP), funds from the Purdue Chase Bank account for all campus credit card transactions, State Grants and Scholarships, daily bank deposits, electronic payments, private loans, and governmental payments of student tuition.

We will accurately request Department of Education funds for all student PELL grants, Direct Loans, SEOG Grants and Federal Work Study Programs. We will ensure these funds are accurately transferred into the correct IPFW general ledger accounts (SAP).

Manage Revolving Fund Bank Accounts to assure adequate cash balances are maintained.

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

The accurate and timely claiming of funds will be measured by a daily review of Purdue Treasury reports and a monthly balancing process in the Bursar office and the reconciliation of the Chase Monthly Bank Statement by the Accounting Services department. All of the above processes require balancing to a zero outstanding balance. If a zero balance is not achieved, a detailed explanation of the outstanding issues is provided, and cleared as soon as possible.

Annual reporting to the Department of Education (FISAP) of federal campus based funds.

**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?

No
Challenges - What challenges, other than financial resources, might affect your progress toward accomplishing this unit goal?

The Treasury report, provided by Purdue, includes all payments/deposits for all four Purdue campuses. One challenge is to ensure we identify and claim all student related funds that belong to the IPFW campus.

Prioritizing Time

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

Ongoing

**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.

**Task Force:**
1. Comment on the specificity of the goal:
   - **Very specific goal**
   - Aligns with I.B, I.M.1 and IV.B
2. Comment on the goal's measures:
   - **Medium Priority**
   - Actions and Metrics: Actions seem like a complex attempt reliant on multiple factors (Marketing, Academic units, physical systems). Metrics seem reasonable, but need some quantification in order to be measurable.
3. Comment on the unit's ability to achieve the goal (include a consideration of the departmental profile and budget data):
   - Stated No- Goal not achievable without additional resources and cooperation from factors stated above.
4. Comment on the goal’s relevance:
   - Seems relevant to 'accounts receivable' goal.
5. Comment on the timeline of the goal:
   - Goal to be evaluated in 2016- Not clear as to whether the goal or the goal actions are to be evaluated.

Possible opportunities for collaboration or suggestions for addressing a gap:
**Question:** Unit Goal - What is your unit goal?

Bursar’s Office will increase the number of students who utilize their Busar Student Account (accessed through my.ipfw.edu) from 20% to 50% of the currently registered students.

**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.

I.B - Increase student engagement

I.M.1 - Retention

IV.B - Efficiency

**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?

In person interactions with customers, through printed notifications on system issued refund checks, through email reminders, through electronic consent etc.

Work with the marketing department to increase awareness of the Touchnet Bursar Student Account product. This resource provides numerous services; direct deposit of refunds, text alerts, eStatements, payment plans, online payments, 1098-T tax statements, ability to establish authorized users, authorized users ability to receive and review account information etc.

Work with academic department advisors to create a partnership where they are assisting students in educating them in the importance of their student account and making referrals to Bursar for questions.

Implement Touchnet Mobile to encourage easier access to the Bursar Student Account.

Explore creation of kiosk for student self-service in the Bursar Office lobby.

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

Review monthly Touchnet reports showing student and authorized user log-ins.

Review monthly Touchnet reports showing front-line usage of student account emulation.

Measure number of students utilizing direct deposit refunds by dollar amount and percentage of students receiving refunds each semester.

**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?

Marketing support - kick-off campaign to spread awareness.

Partnership with NSO to capture new, incoming freshman in an ongoing basis.

Continued IT dedication to Touchnet Mobile project.

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

If we are unable to receive Marketing support this goal is not realistic.

Bursar has been removed from the New Student Orientation (NSO) schedule.

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

To be evaluated at the end of Spring 2016.

**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.

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

Goal could be part of action stated “… resulting in better customer experience”

2. Comment on the goal's measures:

Medium Goal—It should be a High goal.

Actions: Not clear as to how overall efficiencies would be achieved and what additional responsibilities would be assigned.

Metrics: No metrics specified so it is unclear as to how increased efficiency would be measured.

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

Stated Yes with current resources.

Challenges with ‘cross training’ new hires.

4. Comment on the goal's relevance:

Relevant to ‘customer service’ and campus PR.

5. Comment on the timeline of the goal:

Stated Ongoing-Goal not clear as to expectations and when they would be met.

Possible opportunities for collaboration or suggestions for addressing a gap:

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

Cross train all front line Bursar clerks in all duties.

**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**

This will increase overall efficiencies in the office resulting in better customer experience overall and clerks to be assigned additional responsibilities.

**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?
Rotating schedule of clerical duties between clerks. Supervisor and peer training, maintain updated procedures for tasks.

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

Tasks will be accomplished by all clerks accurately and efficiently with minimal questions to supervisor.

**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?

NA

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

Need to be fully staffed in order to accomplish this goal. When turn over occurs we must start over again with cross training.

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

Ongoing.

**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?
**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:
**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?