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

FAID Financial Aid

Program Summary

Task Force: Suggestion: See examples of goals, actions and metrics on USAP website. Metrics should all be specific and measurable, use action verbs and be able to support with data that at the time period specified, you did what you set out to do, or made steps toward achieving your goal(s).

Thank you for the work that went into this report. Through the USAP process, we are working to create at IPFW a culture of continuous improvement, and we think that setting specific and measurable goals is an important part of getting individuals and units at IPFW to think differently about planning and the future.

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)

Our Mission

We provide financial services to assist students in realizing their dream of graduating on time from Indiana University Purdue University - Fort Wayne.

Our Vision

We will use all the resources at our disposal to ensure that finances do not prevent qualified students from earning IPFW degrees.

Our Values

- Educational success is essential for the betterment of students' lives and society.
- Vision and innovation are critical to our effectiveness in an ever-changing environment.
- All individuals should be treated with empathy and respect.
- Successful delivery of financial services is our passion.

Our Goals

- Package financial aid to support the University's mission to recruit and retain a high quality, diverse class.
- Maximize sources of governmental, institutional, and private funding for students.
- Provide personalized, timely, quality service to our customers and each other.
- Educate the public and policy leaders about student funding needs.
- Promote effective student money and debt management.
- Manage our office with integrity and fiscal responsibility.

Our office supports the mission of the university by successfully administering over 90 million dollars of institutional, state and federal funds for approximately 75% of our student body on an annual basis.
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. Processed over 19,816 federal and state aid applications in 2013-14. Packaged and awarded $90,672,758 from 21 different major aid program to 9,539 degree seeking students. These efforts directly impacted the retention rate of 71% of the student body during the 2013-14 award year.
2. Updated the Satisfactory Academic Progress policy in 2012-2013 to require all students who appeal their suspensions to develop an achievable academic plan with their academic advisor. This change has improved communication between the academic advisors and their student advisees directly impacting our retention and graduation rates.
3. Moved to the Common Scholarship Application for the 2012-2013 award year. The new process significantly increased the number of qualified applicants from below 700 in 11-12 to over 2,500 in 12-13. It has also streamlined the decision and notification processes.

**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.

1. The office provides incoming and continuing students education on developing smart financial habits, general budgeting, and overall financial wellness issues. In 2013, these topics were directly presented through over 16,903 in-person visits, 13,306 phone conversations, 11,533 email responses. Additionally, we provide information through MyIPFW, Orientation, Student Loan Counseling, our webpage, and multiple financial aid nights in the local area.

**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.

1. With the assistance of SIS, our office began running student award packaging before file verification beginning in Fall 2014. This process change resulted in the packaging of incoming and current students 75 days sooner than in 2013-2014.
2. Adjusted student award packaging to maximize state aid over institutional aid beginning in Fall 2013. This change in packaging saved the University over $180,000 in institutional funds in 2013-2014.
3. University developed videos in 2013 on state aid programs were recognized and adopted by the Indiana Commission on Higher Education for distribution to all students statewide.

**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. Reduced the number of phone calls and the wait time on phone calls during the months (busiest phone times) for summer 2014 from summer 2013. Total phone volume was down by 16%, wait times were reduced by an average of 56 seconds.
2. With the assistance of SIS, our office began running student award packaging before file verification beginning in Fall 2014. This process change resulted in the packaging of incoming and current students 75 days sooner than in 2013-2014.
3. Adjusted student award packaging to maximize state aid over institutional aid beginning in Fall 2013. This change in packaging saved the University over $180,000 in institutional funds in 2013-2014.
4. University developed videos in 2013 on state aid programs were recognized and adopted by the Indiana Commission on Higher Education for distribution to all students statewide.
**Question:** Other Accomplishments - Please list any other significant accomplishments from the last three years that do not align with Plan 2020.

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

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

Not Applicable

**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?

Financial Aid is required to operate within a significant number of federal and state regulations. At the federal level, the U.S. Department of Education is responsible for drafting and implementing regulations in conjunction with The Higher Education Act (HEA). Though the HEA was signed into law in 1965, it constantly needs to be evaluated and reauthorized. In 2009 the Congress passed the latest reauthorization of the Act called Higher Educations Opportunity Act. Through this reauthorization process, new regulations are established. The Department of Education is responsible for publishing these regulations in the Code of Federal Regulations (CFR), then interpreting and implementing them.

All state programs fall under the Indiana Commission on Higher Education (ICHE) through the Division of Financial Aid. The Division of Student Financial Aid's (SFA) mission is to make college affordable through need-based financial aid awards and to allow choice by granting awards to those attending public, independent and proprietary colleges. SFA and ICHE has clear guidance through state statute, and develops rules and regulations for each of the programs under its control.

Additionally, some federal and state laws outside of financial aid impact our processes as well. For instance, student and parent information provided on the Free Application for Federal Student Aid is matched against Department of Homeland Security, Department of Justice, Department of Defense, Veterans Administration, and Social Security Administration databases. If there is conflicting information, the financial aid office staff is required to resolve the conflict before awarding any funds.

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

1. Some regulations are contradictory in nature, limiting our ability to work with students/families to assist them in meeting their educational costs.
2. Regulatory requirements force the implementation of processes that reduce our efficiencies and takes staff away from our mission of assisting students.
3. Regulatory changes require constant monitoring and software upgrades, again reducing efficiency.

Benefits

1. 77 of the 90 million in financial assistance we awarded in 2013-14 was provided by the federal and state governments.
2. Provides us a standardized format, ensuring students are treated equally when awarding.

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. Financial Aid needs to move reporting requirements to Institutional Research. Historically, the Financial Aid Office has had to develop their own reports to meet institutional reporting requirements. This has taken staff away from other areas, reducing office effectiveness at meeting our mission and goals.
2. The median income of financial aid applicant's families at IPFW is $47,547. We have the highest percentage of Pell eligible students (needy) within the Purdue system. Yet nearly 100% of IPFW's institutional aid is focused on merit rather than a healthy balance between need and merit based awards. Unless IPFW increases the availability of need based institutional aid, we will be unable to assist students in meeting their educational costs adding to their financial concerns.
3. Student Information Systems and IT support are not properly resourced to support a University of our size. We need these areas to be improved significantly to effectively leverage even 60% of the strengths of the Ellucian/Banner product.
4. Current office space is poorly designed for meeting the needs of students. Advising is done at the front desk, rather than in private one on one sessions. The current layout contributes to this inefficiency, which reduces student satisfaction and the accurate dissemination of information.

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/

FY 14-15 Budget Information is consistant for our current size and operations.
#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 overall outcome of the goal is specific, but you need to do more to describe concretely the action steps that will be taken. For example, what steps will you take to train departments on the work study budgets and expectations?

2. Comment on the goal's measures:

   The overall metric of 100% achieved is good. What % decrease is your target for the unsubsidized loan volume per student?

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

   Accomplishing the goal within a year (as the timeline indicates) seems feasible, especially because it does not depend on extra resources. We noted that this goal needs support from executive leadership. The challenge you stated goes back to the actions steps – training for departments is essential.

4. Comment on the goal’s relevance:

   The goal is relevant and would align with PLAN 2020.

5. Comment on the timeline of the goal:

   Timeline for completion of goal is clear.

**Possible opportunities for collaboration or suggestions for addressing a gap:**

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

Change the order of packaging financial aid programs to reduce loan indebtedness and facilitate the hiring of student employees.

**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.

Foster Student Success and Create a Stronger 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?

Packaging formulas have already been adjusted to facilitate the accomplishment of this goal for the 2015-16 award year. Federal work study funds will now be packaged before unsubsidized loans in the packaging formula. This packaging order change will have a significant impact on loan indebtedness.

Our office still needs to coordinate with other university areas to ensure processes are in place to maximize the effectiveness of this goal. Specifically, all departments will need to be provided an annual work study budget, and the expectation to operate within those fund guidelines.

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

**Immediate Metric (within 1 year)**

Success will be achieved when 100% of 2015-2016 applicants are packaged in this manner.

**Long Term Metric (3 years +)**

Success will be seen with a decrease in unsubsidized loan volume per student

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

Internal processes are already established. Supporting units are aware, and processes are being established outside the office.

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

Support from executive leadership.

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

Ensuring university departments understand the challenges of managing departmental work study budgets.

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

Packaging of 2015-2016 students will happen in April 2015. Budgets will be established during the University budget process. Training for departments will occur in summer 2015.
#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 overall outcome of the goal is specific, but you need to do more to describe concretely the action steps that will be taken. For example, you only mention staff training – training on what topics?

2. **Comment on the goal's measures:**
   
   Solid metrics, but we recommend that you evaluate the actions steps and be more specific. Question: How will you work with the Registrar Office – define roles?

3. **Comment on the unit’s ability to achieve the goal (include a consideration of the departmental profile and budget data):**
   
   Question: What type of support do you need specifically from the executive level?

4. **Comment on the goal’s relevance:**
   
   The goal is relevant and would align with PLAN 2020.

5. **Comment on the timeline of the goal:**
   
   Timeline for completion of goal is clear, pending approval.

**Possible opportunities for collaboration or suggestions for addressing a gap:**

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

Develop an implement a system to improve the retention rate within the semester and reduce Return of Title IV Funds returns.

**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.

Foster Student Success and Create a Stronger University

I.A.2
I.D.3
IV.B.3
IV.B.4

**Question:**
FAID Financial Aid

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?

Financial Aid will work with the Office of the Registrar to work with students who are completely withdrawing during the semester to find alternative options in an attempt to; improve retention, reduce Return of Title IV Funds, and reduce University receivables.

Our office still needs support from executive leadership to make this program a reality.

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

Immediate Metric (within 1 year)

10% reduction in Fall 2015 within semester withdraws as compared to the 3 year average of Fall 12, 13 and 14.

Long Term Metric (3 years +)

Significant reduction (20%+) in withdrawn students and R2T4 funds.

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

Program outline is already developed. Specific procedures will be developed once approval is provided.

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

Executive level support

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

Communication with students and staff regarding the changes to the withdrawal policy.

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

Hopeful to have this approved in time to communicate changes before the end of spring 2015 semester. Implement program in Fall 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:

This goal is specific.

2. Comment on the goal's measures:

Suggestion: It would help to have a statement of where you are now with the number of meetings and where you would like to go, or would you like to maintain the current number? Whichever would be more appropriate to your unit's goal, i.e. something that would help us to know if you are running at capacity, or if you would like to increase your current production?

Example: A goal of an “Increase in quality discussions of 10% from _____ to _____ in year one”.

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

Goal is dependent on remodel of lobby and assistance from SIS for imaging.

4. Comment on the goal's relevance:

The goal is relevant and would align with PLAN 2020.

5. Comment on the timeline of the goal:

Ongoing – Target is Fall 2015

Possible opportunities for collaboration or suggestions for addressing a gap:

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

Improve quality of face to face advising services.

**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.

Foster Student Success and Creation of Knowledge

I. D.3

II.B

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

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

Over the past year and a half, our office has developed an advising area consisting of one Associate Director, three file clerks, and five to seven student workers responsible for advising students on financial aid issues. These staff members are in the process of being trained and empowered to provide quality advisement across the spectrum of services we provide.

Additionally, the physical structure of the office is in the process of being adjusted to facilitate a waiting area for private office visits. Adding an imaging system will reduce paperwork storage, freeing up greater space for advising as needed. These physical changes will reduce the amount of information being shared at the front desk and improve the quality of communication.

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

**Immediate Metrics (within 1 year):**
- Reduction in questions being answered at the front counter.
- Increased number of quality (private office) discussions.

**Long Term Metrics (3 years +):**
- Reduction in complaints to the VCSAEM and other university leadership.

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

Current office leadership have already begun supervising the training of staff. Once physical changes have been made, further training can continue.

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

- Assistance from Building and Grounds to develop a more accommodating waiting area.
- Assistance from SIS for imaging.

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

- Time constraints of the staff and support from SIS and Building and Grounds.

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

This goal is ongoing. The waiting area will hopefully be more functional in time for fall 2015. Imaging is a goal for as soon as possible.
**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:

   This goal is specific.

2. Comment on the goal's measures:

   Suggestion: It would help to have a statement of where you are now with the number of meetings and where you would like to go, or would you like to maintain the current number? Whichever would be more appropriate to your unit's goal, i.e. something that would help us to know if you are running at capacity, or if you would like to increase your current production?

   Example: "Reduce phone volume by 10% from ____ to ____ in year one”.

   Question: What is your target?

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

   Yes, this goal is achievable.

4. Comment on the goal's relevance:

   The goal is relevant and would align with PLAN 2020.

5. Comment on the timeline of the goal:

   Ongoing – We recommend some checkpoints.

   Possible opportunities for collaboration or suggestions for addressing a gap:

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

Continue to reduce the number of phone calls as well as the wait times on phones.

**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.

Foster Student Success and Create a Stronger University

I.D.3

IV.B.3

**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?

Continue to improve the timeliness of our processes to reduce the need to contact our office directly to resolve issues. We also will seek to improve our online presence through the website, MyIPFW, and social media sites to reduce the number of incoming phone calls.

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

Immediate Metrics (within 1 year)

Continued reduction in phone volume overall.

More even spread in phone volume over the entire award year cycle (avoiding peeks and valleys).

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

None beyond what we currently have available.

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

None beyond what we currently have available.

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

Support of SIS to ensure the timeliness of processes.

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

On-going

**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:

This goal is specific.

2. Comment on the goal's measures:

Question: What are some short term metrics that are related to the action plan?

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

Question: What is the cost to partner with an outside vendor?

4. Comment on the goal's relevance:

The goal is relevant and would align with PLAN 2020.

5. Comment on the timeline of the goal:

Unclear – do you have a timeline for the contacts? Suggestion: Checkpoints

Possible opportunities for collaboration or suggestions for addressing a gap:

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

Reduce our student loan default rate and ensure students are aware of repayment options.

**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.

Foster Student Success and Creation of Knowledge

I

II.B

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

Medium - Ongoing

**Question:** Actions - What action(s) does your unit plan to take to support this unit goal?
Students are currently encouraged to participate in online exit loan counseling, but are not required to do so. Even those that participate can skip through the sections fairly quickly with little retention of information.

Our office will be partnering with an outside vendor to identify students and contact them by phone several times before repayment begins to ensure all repayment options have been explored and discussed. This should have a positive affect on alumni's opinions of IPFW as well as reducing our default rate.

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

- Long Term Metrics (3 years +)
- Reduction in 3yr cohort default rate by .5% or more.

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

- SIS support for report generation for the outside vendor to contact and discuss options.

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

- Financial support for outside vendor to contact and discuss options.

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

- Timeliness of contacts will have a huge impact on effectiveness.

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

- Beginning with May 2015 graduates.

**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:

This goal is specific.

2. Comment on the goal's measures:

Question: What is your baseline?

Suggestion: It would help to have a statement of where you are now with the number of complaints produced and where you would like to go, or would you like to maintain the current number?

Example: Decrease the number of complaints by 30% from X to X.

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

Assistance is needed by SIS or Telephone Operations.

4. Comment on the goal’s relevance:

The goal is relevant and would align with PLAN 2020.

5. Comment on the timeline of the goal:

Timeline not given, so assumed the goal would be assessed annually and include checkpoints.

Possible opportunities for collaboration or suggestions for addressing a gap:

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

Become more proactive with office communications to 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.

Foster Student Success

**I - Foster Student Success**

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

Medium - Ongoing

**Question:** Actions - What action(s) does your unit plan to take to support this unit goal?
The office currently utilizes a combination of communication methods to reach our students. Most of these methods are reactive in nature, which places the responsibility for the communication on the student/family. Considering and utilizing more strategic communication strategies will improve effectiveness and timeliness of communications. Specific strategies that are being considered are Customer Relationship Management (CRM) software, a predictive dialer/telephone messaging service, and text messaging.

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

- Long Term Metrics
- Better satisfaction scores on surveys
- Less complaints

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

- Current staff can develop scripts for the various systems.

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

- Assistance of SIS and/or telephone operations will be needed depending on system choices.

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

- System integrations, support of outside offices, costs.

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

- As soon as possible.

**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 needs a more detailed action plan.

2. Comment on the goal's measures:

   Metrics are confusing – maybe with a more detailed action plan we would understand the measurements. Question: How are these connected to training? Are these the training topics?

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

   Achievable – needs some assistance from SIS.

4. Comment on the goal’s relevance:

   The goal is relevant and would align with PLAN 2020.

5. Comment on the timeline of the goal:

   Ongoing – assumed that this will be assessed annually.

Possible opportunities for collaboration or suggestions for addressing a gap:

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

Strengthen and build upon existing staff training program.

**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.

Create a Stronger University

**IV.B.3**

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

Medium - Ongoing

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

Our Associate Director for Advising and Assistant Director for Compliance are responsible for new and continuing staff training. Programming already takes place, but we have been working hard to develop internal metrics to evaluate the effectiveness of such training.

**Question:** Metrics - With what metrics will you assess progress toward accomplishing this unit goal on an annual basis?
Immediate Metrics (within 1 year)

Identify areas for demonstrating quantifiable results through Banner system records/reports.

Long Term Metrics (3 years +)

Identify established standards (% rates, files worked, etc.) for demonstrating success through Banner system records/reports.

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

Current office leadership have already been supervising the training of staff. Adding effectiveness measures to the training responsibility is not outside of their current skill sets.

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

Assistance from SIS in identifying possible Banner system records and reports for establishing effectiveness indicators.

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

Time constraints of the staff and support from SIS. Current staff leadership also have other duties that take priority over staff training. SIS has responsibilities that take away from training.

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

This goal is ongoing. Training will be a significant goal for the next several years.

**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: 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?