Mission

Administration and Finance (ADFI) is committed to delivering exceptional customer service. Policies, practices and procedures are designed with our customers' needs in mind. Through this commitment to service excellence, ADFI supports IUPUI's vision of being one of the nation's best urban universities.

Goals and Objectives

1. Increase use of technology to streamline processes

To explore how technology can enhance service, increase on-line ordering. 

**Campus Planning Theme:** Best Practices  
**Secondary Goals:**  
**Sub Unit:** CDPM  
**Time Frame:** On going.

Actions taken for 2003-2004:

Website has been designed for business cards/stationery ordering.

Evidence of Progress for 2003-2004:

Number of orders taken on line.

Activities planned for 2004-2005:

Enhance IKON website to facilitate on-line ordering of business cards and stationery. Add other products when possible.

- To scan invoices for the Bookstores and other pertinent data records for Human Resources and Payroll so they will have desktop retrieval of records.

**Campus Planning Theme:** Best Practices  
**Secondary Goals:**  
**Sub Unit:** Accounting  
**Time Frame:** FY 2004-05

Actions taken for 2003-2004:

Met with Payroll, Human Resources and Bookstores to develop a plan.
Evidence of Progress for 2003-2004:

Scanning of documentation

Activities planned for 2004-2005:

To define process with the three units

☐ Continue pursuit of web-based payment and bill presentation.

Campus Planning Theme: Best Practices
Secondary Goals:
Sub Unit: Bursar
Time Frame: FY 2002-04

Actions taken for 2003-2004:

Have worked with UA and BL representatives, identified a vendor, and have launched a pilot for student account payments university wide

Evidence of Progress for 2003-2004:

Number of service enrollees, measure of payments by type.

Activities planned for 2004-2005:

Use student account process as a learning model in designing campus wide and university wide payment and bill presentation processes.

☐ Develop a new training registration system.

Campus Planning Theme: Best Practices
Secondary Goals:
Sub Unit: HRA
Time Frame: FY2004

Actions taken for 2003-2004:

An online registration system was created to allow employees to electronically register for HR training sessions

Evidence of Progress for 2003-2004:

Increase problem-free electronic registrations.
Activities planned for 2004-2005:

Expand electronic registration for additional workshops. Share CLN registration technology.

☐ Develop and maintain a 5-Year Fiscal Plan as identified in the 5-Year Strategic Plan

**Campus Planning Theme:** Best Practices

**Secondary Goals:**

**Sub Unit:** Center for Young Children

**Time Frame:** 2003/2004 and on-going

**Actions taken for 2003-2004:**

Hire business manager

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**Evidence of Progress for 2003-2004:**

Goals identified within the 5-Year Stratetic Plan met

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**Activities planned for 2004-2005:**

develop tools for financially prioritizing goals within the 5-Year Strategic Plan, develop a fundraising plan

☐ Develop online new faculty orientation.

**Campus Planning Theme:** Best Practices

**Secondary Goals:**

**Sub Unit:** HRA

**Time Frame:** FY2004 and ongoing

**Actions taken for 2003-2004:**

Identified faculty advisor, finalized script, reviewed content with UHRS.

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**Evidence of Progress for 2003-2004:**

Online orientation module complete and regularly used.

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**Activities planned for 2004-2005:**

Prepare content, utilize campus resources; communicate and market online orientation.

☐ Development of core metrics for Reporting/Accountability
Development of new systems for Purchasing Accounts Payable

**Campus Planning Theme:** Best Practices

**Secondary Goals:**
- Sub Unit: Accounting
- **Time Frame:** Fiscal Year 2004-05 through FY2005-06

**Actions taken for 2003-2004:**

Participate with University Administration to implement an integrated Accounts Payable

**Evidence of Progress for 2003-2004:**

Completion of the various sub systems, i.e., Requisition, PO, Quote, Accounts Payable

**Activities planned for 2004-2005:**

Continue to work with committees on development and implementation of these new University-wide systems.

Direct Deposit of Student Refunds

**Campus Planning Theme:** Best Practices

**Secondary Goals:**
- **Sub Unit:** Bursar
- **Time Frame:** FY2001 and on-going

**Actions taken for 2003-2004:**

Direct deposit of refunds initiated in FY2000

**Evidence of Progress for 2003-2004:**

Shift in activity from paper checks to direct depositing.

**Activities planned for 2004-2005:**

Will continue to promote the use of direct deposit by working on automation of enrollment, and will transition to the new Peoplesoft version of this product.

Electronic routing, saving of E-Docs to HRMS to eliminate duplicate time consuming data entry.

**Campus Planning Theme:** Best Practices

**Secondary Goals:**
- **Sub Unit:** Payroll
- **Time Frame:** December 2002 to implementation in October 2003.
Actions taken for 2003-2004:

Implemented October 2003 E-Doc enhancements are prioritize and completed by the Team as money and resources are available from the University.

Evidence of Progress for 2003-2004:

Timely payments to employees. Customer (Departments) satisfaction with using E-DOCs; full functionality of enhancement list.

Activities planned for 2004-2005:

The next enhancement to this piece of HRMS is scheduled for December 2003.

Encourage use of electronic Purchasing system

**Campus Planning Theme**: Best Practices  
**Secondary Goals**:  
**Sub Unit**: Purchasing  
**Time Frame**: FY2001 and on-going

Actions taken for 2003-2004:

Contacts are made with departments still processing paper requisitions to encourage the use of electronic system: the new B2B web based TOPS Web system requires users to have electronic TOPS access in order to place these orders.

Evidence of Progress for 2003-2004:

Number of paper requisitions will decline and electronic reqs and B2B orders will increase

Activities planned for 2004-2005:

Will continue to contact departments who are submitting paper requisitions and market the many benefits of the electronic delivery

Encourage use of the Procurement Card for purchases where appropriate.

**Campus Planning Theme**: Best Practices  
**Secondary Goals**:  
**Sub Unit**: Purchasing  
**Time Frame**: Fiscal Year 2000 and on-going

Actions taken for 2003-2004:

Promote the use of procurement cards as electronic processes have been created which reduce manual processing
Evidence of Progress for 2003-2004:

Monitor number of procurement card transactions and dollars spent

Activities planned for 2004-2005:

Continue to meet with University departments to identify potential areas of use for Procurement Cards. Adopt a new Bankcard via an RFP process. Increase dollar and cycle limits as procurement limits are raised across campus. Develop more web based applications, application amendment and reports.

☑ Encourage vendors to submit invoices electronically
  Campus Planning Theme: Best Practices
  Secondary Goals:
  Sub Unit: Purchasing
  Time Frame: Fiscal Year 2000 and on-going

Actions taken for 2003-2004:

Many vendors are currently submitting invoices electronically.

Evidence of Progress for 2003-2004:

The number of electronic invoices can be monitored from year to year and compared against the number of traditional paper invoices. Discounts can be compared with prior years discounts when terms discounts have been given

Activities planned for 2004-2005:

Discussions will continue with all vendors to encourage the submission of electronic invoices. We will build this into new contract negotiations as an optional condition with % discounts for early payments

☑ Establish objective model for venue usage at track and soccer, swimming and tennis
  Campus Planning Theme: Best Practices
  Secondary Goals:
  Sub Unit: Natatorium
  Time Frame: Ongoing

Actions taken for 2003-2004:

Scheduling software research, assessing needs of divisions
Evidence of Progress for 2003-2004:

Increased revenue, ease of booking and tracking events

Activities planned for 2004-2005:

Establish master scheduler and prioritize with Aux. Computer Department

☑ Establish online survey to obtain customer feedback.
   **Campus Planning Theme:** Best Practices
   **Secondary Goals:**
   **Sub Unit:** HRA
   **Time Frame:** FY2004 and on-going

Actions taken for 2003-2004:

Piloted a web-based survey to collect feedback from applicants.

Evidence of Progress for 2003-2004:

Survey data is obtained and analyzed.

Activities planned for 2004-2005:

Refine survey instrument and utilize online mechanism to reach applicants, new hires, and department contacts. Refine timing and content.

☑ Expand and enhance existing self-service processes.
   **Campus Planning Theme:** Best Practices
   **Secondary Goals:**
   **Sub Unit:** Bursar
   **Time Frame:** FY 2003 and on-going

Actions taken for 2003-2004:

Began use of QuikPAY and terminated WebACH. Designed on-line and archive billing processes.

Evidence of Progress for 2003-2004:

Meeting of timeline for phased releases.
Activities planned for 2004-2005:

Set up and use electronic check presentment to serve customers, remove extra step in depositing, decrease lag time with bank deposit. Use of QuikPAY for credit card usage. Design and setup all new splash pages for new processes related to SIS. Continue use of PolyCom to minimize travel costs and incorporate into training.

☑ Expand Website to offer more comprehensive HR services

**Campus Planning Theme:** Best Practices  
**Secondary Goals:**  
**Sub Unit:** HRA  
**Time Frame:** FY 2004 and ongoing

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Actions taken for 2003-2004:

Revamped website format; added additional work/life content.

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Evidence of Progress for 2003-2004:

updated versions of web content and HR forms.

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Activities planned for 2004-2005:

Expand work/life section, add policies and all forms in electronic format. Continually review and improve.

☑ Fully develop GIS capabilities

**Campus Planning Theme:** Best Practices  
**Secondary Goals:**  
**Sub Unit:** CFS  
**Time Frame:** FY 2002 and ongoing

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Actions taken for 2003-2004:

Potential applications reviewed. Preliminary base map developed with some features: i.e., disabled parking located. Part time funding allocated for updating exterior map.

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Evidence of Progress for 2003-2004:

Layers of useful, accurate, automated geographic and database data will be available for use.

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Activities planned for 2004-2005:

Base map developed. Progress has been made in development of utilities layer. Landscape layer complete with features inventoried.
Implement new software system - SIS

**Campus Planning Theme:** Best Practices
**Secondary Goals:**
**Sub Unit:** Bursar
**Time Frame:** FY2001 and on-going

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**Actions taken for 2003-2004:**

1.0 FTE has been committed to this project since its beginning in 2001. 1.5 FTE was added to the project effective July 1, 2001. Basic PS training completed for 5 persons.

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**Evidence of Progress for 2003-2004:**

Progress of project.

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**Activities planned for 2004-2005:**

Basic PS training planned for 6 additional persons. Processing will begin March 2004 with the implementation planned for June 2004. Continued support to the SF team (human resources, equipment).

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Implementation of On-Line Print Ordering

**Campus Planning Theme:** Best Practices
**Secondary Goals:**
**Sub Unit:** CDPM
**Time Frame:** Ongoing

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**Actions taken for 2003-2004:**

Process has been designed

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**Evidence of Progress for 2003-2004:**

Implementation of On-Line Print Ordering

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**Activities planned for 2004-2005:**

Cost Analysis to be completed along with request for proposal from vendors

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Improve Online Application System

**Campus Planning Theme:** Best Practices
**Secondary Goals:**
**Sub Unit:** HRA
Time Frame: FY2004 ongoing

Actions taken for 2003-2004:

Identified system gaps; created list of enhancements.

Evidence of Progress for 2003-2004:

Cycle time for filling vacant positions; increased ease of use.

Activities planned for 2004-2005:

Refine automated system, enhancing features.

☐ Increase customer service and revenue Through implementing new features of e-commerce

Campus Planning Theme: Best Practices

Secondary Goals:

Sub Unit: Natatorium

Time Frame: Ongoing

Actions taken for 2003-2004:

Met with Aux. Computer Department to discuss some of these needs

Evidence of Progress for 2003-2004:

When new features are being utilized

Activities planned for 2004-2005:

Programming registration, pro-shop and ticket sales

☐ Increase e-commerce activities with vendors

Campus Planning Theme: Best Practices

Secondary Goals:

Sub Unit: Purchasing

Time Frame: FY2001 and on-going

Actions taken for 2003-2004:

Consultant hired to act as the conduit between the TOPS system and contract vendor’s web sites for web order placement with TOPS back office approvals intact.
Evidence of Progress for 2003-2004:

Number of B2B transactions processed; decreased number of traditional POs issued

Activities planned for 2004-2005:

Will continue to develop B2B contracts with more vendors and market the TOPS Web to department end users

Increase number of conference evaluations returned

Campus Planning Theme: Best Practices
Secondary Goals:
Sub Unit: Conf Center
Time Frame: FY 2004

Actions taken for 2003-2004:

On-line evaluation format determined

Evidence of Progress for 2003-2004:

Number of on-line evaluations received from conference attendees and planners.

Activities planned for 2004-2005:

Determine procedure to ensure integrity of responses

Increase on-line registration for conferences

Campus Planning Theme: Best Practices
Secondary Goals:
Sub Unit: Conf Center
Time Frame: FY 2002 and ongoing

Actions taken for 2003-2004:

Develop on-line registration process

Evidence of Progress for 2003-2004:

Process complete and is utilized
Activities planned for 2004-2005:

Develop on-line registration process

☐ New Purchasing system

Campus Planning Theme: Best Practices
Secondary Goals:
Sub Unit: Purchasing
Time Frame: FY 2003 - FY 2005

Actions taken for 2003-2004:

Participate on design teams for rewrite of a new windows based TOPS system.

Evidence of Progress for 2003-2004:

Status of project

Activities planned for 2004-2005:

Continue to work with design teams comprised of Purchasing staff, campus department staff and UITS staff from both IUPUI and IUB campus’s to design, test and implement the new Purchasing system

☐ On-line Parking Permit Purchases

Campus Planning Theme: Best Practices
Secondary Goals:
Sub Unit: Parking
Time Frame: FY 2004/2005

Actions taken for 2003-2004:

Students are now able to purchase parking permits on-line with credit cards. Campus Housing residents may now purchase their permits on-line. Working with ADFI LSP to add disabled permit capabilities on-line.

Evidence of Progress for 2003-2004:

Number of permits being processed electronically

Activities planned for 2004-2005:

☒ Provide customers with additional service through wireless LAN in public areas of University Place

Campus Planning Theme: Best Practices
Secondary Goals:  
Sub Unit: Conf Center  
Time Frame: FY 2004

Actions taken for 2003-2004:
Investigated various options available for wireless LAN

Evidence of Progress for 2003-2004:
System installed and utilized by conference attendees

Activities planned for 2004-2005:
Evaluate wireless systems for best application at University Place

☑ Real-time customer deposits and transaction history.

Campus Planning Theme: Best Practices
Secondary Goals:
Sub Unit: JagTag

Actions taken for 2003-2004:
Discussions for need.

Evidence of Progress for 2003-2004:
Customer deposits are applied immediately to their Jagtag account and transaction history is readily available.

Activities planned for 2004-2005:
Continue to promote and emphasize the website to add funds electronically and manually print transaction history as requested by customers.

☑ Set up secure website for our customers to pay online. Set up secure website for our customer/departments to submit accounts.

Campus Planning Theme: Best Practices
Secondary Goals:
Sub Unit: Delinquent Acct Services
Time Frame: FY 2004 and on going
Actions taken for 2003-2004:

Set plan for website with ADFI Tech Support

Evidence of Progress for 2003-2004:

Receiving more info via web.

Activities planned for 2004-2005:

Review process for possible upgrades/enhancements.

TIME system for hourly employees

Campus Planning Theme: Best Practices
Secondary Goals:
Sub Unit: Payroll
Time Frame: FY2002 and on-going.

Actions taken for 2003-2004:

The system was completed and pilot department began using the system in September 2001.

Evidence of Progress for 2003-2004:

Number of employees using electronic timekeeping system. Departments were encouraged to join TIME before the end of September, 2002 because training will shift to HRMS/PeopleSoft training.

Activities planned for 2004-2005:

System was planned for production in Fall 2001. It is a goal to further expand TIME to include biweekly non-exempt employees in the next phases of HRMS.

To provide imaging of all the historical paper files we currently have in boxes or on microfilm.

Campus Planning Theme: Best Practices
Secondary Goals:
Sub Unit: Payroll

Actions taken for 2003-2004:

On-Base is the system that was chosen.
Evidence of Progress for 2003-2004:

The use of the equipment and person is hired to actually facilitate the process.

Activities planned for 2004-2005:

Share this valuable technology to all ADFI units.

☑ Use more MMS documentation applications: payment authorization for contracted services, bar coding technology integration, grounds equipment preventive maintenance, preventive maintenance for various HVAC components, infrastructure preventive maintenance, and project notes documentation.

Campus Planning Theme: Best Practices
Secondary Goals:
Sub Unit: CFS
Time Frame: FY 2002 and ongoing

Actions taken for 2003-2004:

Manual systems are in place. MMS is now used for payment authorization for contracted services. On-line MMS reports for customers have been created. Access databases house infrastructure PM info. Project notes documentation is being used as a tool in project coordination. MMS modules acquired: Utilities and FM Mobile. Other examples of the use of technology are: HR Resource Request, Pro Card system development, activities database development and RCB matrix database development. Building PM manager hired. Component data continues to be collected and inputed. Tool inventory has been inputed and physical inventories have been taken in the Zones.

Evidence of Progress for 2003-2004:

Less unscheduled down time from breakdowns of building systems. More efficient, planned maintenance.

Activities planned for 2004-2005:

Complete development of component identification and move data to electronic format. Hire a PM coordinator to work on HVAC maintenance implementation. Use Grounds’ managers’ winter downtime to work on Grounds-related items.

☐ 2. Enhance customer service in ADFI units

☑ Better service for University rental fleet patrons. Provide most cost effective car rental service.

Campus Planning Theme: Best Practices
Secondary Goals:
Sub Unit: Parking
Time Frame: FY 04/05

Actions taken for 2003-2004:
Assess internal services and costs associated with the university rental fleet.

Evidence of Progress for 2003-2004:

Choosing the most cost effective, service oriented provider.

Activities planned for 2004-2005:

Assess external rental agencies for costs and services.

☑ 'Complete indoor Projects to enhance the Indoor facility.'

Campus Planning Theme: Best Practices
Secondary Goals:
Sub Unit: Tennis Center
Time Frame: To be completed by December 31, 2004.

Actions taken for 2003-2004:

The courts have been resurfaced; all court light fixtures have been relamped; bought 2 new lounge couches.

Evidence of Progress for 2003-2004:

getting bids on counters in lounge area; Women’s lockerroom will be painted during the Christmas break.

Activities planned for 2004-2005:

Resurface the courts; relamp court fixtures; complete viewing area counter tops; acquire new lounge couches; paint Women’s Lockerroom

☑ ‘Develop 5-year strategic plans for all program areas’

Campus Planning Theme: Best Practices
Secondary Goals:
Sub Unit: EHS
Time Frame: FY2004-05

Actions taken for 2003-2004:

Discussed developing goals and strategic plans with program area managers

Evidence of Progress for 2003-2004:
Development of strategic plans

Activities planned for 2004-2005:

Continue to develop and expand upon current goals

- Develop a business partnership with a national book distributor to provide a cost efficient, risk free and convenient textbook mail service to our customers.

  Campus Planning Theme: Best Practices
  Secondary Goals:
  Sub Unit: Bookstore
  Time Frame: Fiscal 2004-2005

Actions taken for 2003-2004:

Lead/participate with Specialty Books and Nebraska Book Company in the design and implementation of the on-line textbook ordering and fulfillment services.

Evidence of Progress for 2003-2004:

Completion of the on-line web ordering application/pages. Completion of the business operations procedures

Activities planned for 2004-2005:

Continue to work with Specialty Books and Nebraska Book Company to plan/implement a cost efficient, risk free and convenient textbook on-line mail service.

- Encourage focus groups and/or regular customer surveys by sending survey out with every job.

  Campus Planning Theme: Best Practices
  Secondary Goals:
  Sub Unit: CDPM
  Time Frame: On going.

Actions taken for 2003-2004:

Survey was redesigned and will be included with all printing jobs by end of November, 2004.

Evidence of Progress for 2003-2004:

Number of returned surveys.
Activities planned for 2004-2005:

Design survey that is easy to fill out and return. Include survey form with each job.

☑️ Have better applicant pool for open positions. Ensure Pay equity of Parking and Transportation staff.

**Campus Planning Theme:** Best Practices

**Secondary Goals:**

**Sub Unit:** Parking

**Time Frame:** FY 04/05 through 05/06

Actions taken for 2003-2004:

Internally updating essential job function for each position.

Evidence of Progress for 2003-2004:

Completion of review by Human Resources.

Activities planned for 2004-2005:

Review positions with Human Resources.

☑️ Identify like functions and look for increased efficiencies. Internal Growth

**Campus Planning Theme:** Best Practices

**Secondary Goals:**

**Sub Unit:** Natatorium

**Time Frame:** late FY ’04

Actions taken for 2003-2004:

- preliminary meetings with HRA
- discussions with accountant

Evidence of Progress for 2003-2004:

increased productivity

Activities planned for 2004-2005:

- create customer service position
- re evaluate current positions for shuffling

☑️ Increase sponsorship sales by pulling out sales component. Identify means of funding sports sub objective: fill vacant sports marketing position
Campus Planning Theme: Best Practices
Secondary Goals:
Sub Unit: Natatorium
Time Frame: Immediately

Actions taken for 2003-2004:
reconstruct current job as two. One to pursue ‘in house’ (nat/track/tennis) everyday promotion duties and one to ‘sell’ inventory for a larger group encompassing athletics

Evidence of Progress for 2003-2004:
Increased revenue dollars for all sports groups from sponsorship sales

Activities planned for 2004-2005:
create target groups and solicit sales for not only nat/track but also tennis and athletics.

Internal Growth sub objective: Balanced Scorecard
Campus Planning Theme: Best Practices
Secondary Goals:
Sub Unit: Natatorium
Time Frame: currently - ongoing

Actions taken for 2003-2004:
- monthly meetings
- reports given in bi weekly staff meeting

Evidence of Progress for 2003-2004:
BSC becomes part of everyday thinking as opposed to an exercise we report on monthly

Activities planned for 2004-2005:
BSC committee gathering more often, include refreshments in meetings

Add several vending machines on campus. Explore non-consumable items that can be
Campus Planning Theme: Best Practices
Secondary Goals:
Sub Unit: Food Service
Actions taken for 2003-2004:

Partnered with Bookstore to select and purchase items.

Evidence of Progress for 2003-2004:

How well these non-consumable items sell.

Activities planned for 2004-2005:

Determine what items can be easily vended and would be attractive to students, staff and faculty to purchase.

☑ All Conference Managers will obtain Certified Meeting Planner designation

Campus Planning Theme: Best Practices
Secondary Goals:
Sub Unit: Conf Center
Time Frame: FY2003 and ongoing

Actions taken for 2003-2004:

One received certification, one completed course-work

Evidence of Progress for 2003-2004:

Completed for 2 managers

Activities planned for 2004-2005:

Will continue to offer

☑ Comprehensive training program for Conference Center Managers

Campus Planning Theme: Best Practices
Secondary Goals:
Sub Unit: Conf Center
Time Frame: Ongoing

Actions taken for 2003-2004:

Preliminary development of training procedures for conference managers to advance knowledge and assure the highest level of customer service
Evidence of Progress for 2003-2004:

Customer satisfaction surveys

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Activities planned for 2004-2005:

Implement training procedures

☑️ Continued growth and expansion of JagPerks program (formerly known as University Discounts).
   
   **Campus Planning Theme:** Best Practices
   **Secondary Goals:**
   **Sub Unit:** JagTag
   **Time Frame:** On-Going.

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Actions taken for 2003-2004:

Reviewed current contracts and preparing to send renewals and sending contracts to newly targeted vendors.

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Evidence of Progress for 2003-2004:

Number of vendors signing up for the discount program.

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Activities planned for 2004-2005:

Expand the number of vendors currently offering discounts by targeting new ones. We will target food vendors at 10th/Indiana Avenue to sign on board.

☑️ Create avenues for parental involvement within the Center for Young Children as identified within the 5-Year Strategic Plan
   
   **Campus Planning Theme:** Best Practices
   **Secondary Goals:**
   **Sub Unit:** Center for Young Children
   **Time Frame:** 2003/2004 and ongoing

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Actions taken for 2003-2004:

Parent committees identified

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Evidence of Progress for 2003-2004:

Goals identified within the 5-Year Strategic Plan met
Activities planned for 2004-2005:

Enhance communication between parents and Center, increase parental involvement in committee work, enhance parental support within the Center

☑ Develop a guide for customers moving into new or newly renovated campus space including information regarding how to deal with warranty issues and other start-up problems

**Campus Planning Theme:** Best Practices  
**Secondary Goals:**  
**Sub Unit:** CFS  
**Time Frame:** FY 2002 and on-going

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Actions taken for 2003-2004:

Internal process for dealing with University Architect’s Office on warranty issues has been developed. RI-2 and BRTC occupants received a "move-in" brochure. Done informally for IC/TC. Needs more formalization.

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Evidence of Progress for 2003-2004:

Customers will be satisfied with new facility occupancy

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Activities planned for 2004-2005:

Further develop written document and web document in collaboration with UAO.

☑ Develop and implement an effective marketing and development plan as identified in the 5-Year Strategic Plan

**Campus Planning Theme:** Best Practices  
**Secondary Goals:**  
**Sub Unit:** None  
**Time Frame:** 2003/2004 and on-going

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Actions taken for 2003-2004:

update marketing materials

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Evidence of Progress for 2003-2004:

Goals identified within the 5-Year Strategic Plan met

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Activities planned for 2004-2005:

review and update current marketing materials, create a signature fund raising event, enhance Center’s web page, hire a
marketing and fundraising coordinator

☑ Develop quality control (QC) protocols for all CFS divisions
  
  **Campus Planning Theme:** Best Practices
  **Secondary Goals:**
  **Sub Unit:** CFS
  **Time Frame:** FY2002 and on-going

  **Actions taken for 2003-2004:**
  Building Services has developed and trained and provided format for other CFS departments. Grounds has developed and implemented inspection protocols for landscaping and snow removal.

  **Evidence of Progress for 2003-2004:**
  Reliable, documented conditions. Employee accountability

  **Activities planned for 2004-2005:**
  Maintenance will develop strategy for Q.C.

☑ Develop systems for coordinating various activities with customer
  
  **Campus Planning Theme:** Best Practices
  **Secondary Goals:**
  **Sub Unit:** CFS
  **Time Frame:** FY2002 and on-going

  **Actions taken for 2003-2004:**
  Building Services has begun meetings with key customers. Surveys were done by Utility group. Construction Management has agreed to do written schedules on large projects and share them with the customer.

  **Evidence of Progress for 2003-2004:**
  Planned facility activities will be scheduled at times appropriate to the customer’s needs.

  **Activities planned for 2004-2005:**
  Assess and document customers’ operational hours and specific needs

☑ Establish/setup customer service training for all Bookstore employees - implement training
  
  **Campus Planning Theme:** Teaching and Learning
  **Secondary Goals:**
Sub Unit: None
Time Frame: FY 2004

Actions taken for 2003-2004:
Coordinate training

Evidence of Progress for 2003-2004:
Percent complete 100%

Activities planned for 2004-2005:
Schedule training

☑ Expanded use of digital technology for conferences
   Campus Planning Theme: Best Practices
   Secondary Goals:
   Sub Unit: Conf Center
   Time Frame: FY2001 - On-going

Actions taken for 2003-2004:
Have expanded the use of digital technology in the Conference Center

Evidence of Progress for 2003-2004:
Customer satisfaction with improved technology

Activities planned for 2004-2005:
Will continue to explore the use of Wireless technology and fiber optics in the Conference Center

☑ Further develop technology use throughout the Center as identified within the 5-Year Strategic Plan
   Campus Planning Theme: Best Practices
   Secondary Goals:
   Sub Unit: None
   Time Frame: 2003/2004 and on-going

Actions taken for 2003-2004:
Computers for each teacher and in staff lounge, more use of E-mail for communication, network printer for teachers
Evidence of Progress for 2003-2004:

Goals identified within the 5-Year Strategic Plan met

Activities planned for 2004-2005:

Provide professional development for teachers focused at using technology in the classroom for record keeping, and portfolios; investigate ways children can use technology. Develop web page for each classroom, electronic sign-in for parents, enhanced building security to include panic button, security cameras, and palm readers at entrances.

☑ Have 100% of all textbooks in stores at beginning of the semester

Campus Planning Theme: Best Practices
Secondary Goals:
Sub Unit: Bookstore
Time Frame: Ongoing

Actions taken for 2003-2004:

Continue to work with professors to process orders timely to ensure delivery prior to the start of the semester

Evidence of Progress for 2003-2004:

Number of out-of-stock transactions at the start of the semester

Activities planned for 2004-2005:

Will continue to sponsor sessions with faculty and support staff to educate on the need for timely submission of textbook requirements.

☑ Implement "Voice of the Customer" customer satisfaction assessment program in Building Services as a component of a comprehensive customer satisfaction measurement program

Campus Planning Theme: Best Practices
Secondary Goals:
Sub Unit: CFS
Time Frame: FY2002 and on-going

Actions taken for 2003-2004:

Customer service surveys administered and reviewed annually during last three years. Reviewed customer assessment tool (Voice of the Customer) currently used and determined not to use it. Will assess customer satisfaction as an input to the decision regarding renewal of Aramark contract and then review CFS approach to customer service, including assessment of satisfaction.
Evidence of Progress for 2003-2004:

Documented, regularized, comprehensive input is garnered from customers and benchmarks are established. Consistent focused attention of CFS management team on shared view of customer service.

Activities planned for 2004-2005:

Will try "kiosk" assessment methodology. Will also review departmental overall customer service approach.

☑ Improve Security in Research Facilities.
   Campus Planning Theme: Best Practices
   Secondary Goals:
   Sub Unit: None
   Time Frame: One year

Actions taken for 2003-2004:

Establish Research Security Specialist Position.

Evidence of Progress for 2003-2004:

Request for assistance in meeting security requirements.

Activities planned for 2004-2005:

Develop Security Committee in School of Medicine. Educate Researchers in security requirements and procedures.

☑ Improve supervision of Police personnel
   Campus Planning Theme: Best Practices
   Secondary Goals:
   Sub Unit: Police
   Time Frame: On-going

Actions taken for 2003-2004:

Development of departmental supervisory training program.

Evidence of Progress for 2003-2004:

More consistent supervision, fewer complaints and disciplinary actions.
Activities planned for 2004-2005:

Series of training sessions with supervisors.

☑ Improve the traffic flow in Cavanaugh's bookstore - Reengineer Cavanaugh's bookstore floor layout

**Campus Planning Theme:** Best Practices  
**Secondary Goals:**  
**Sub Unit:** Bookstore  
**Time Frame:** FY 2004

Actions taken for 2003-2004:

Design floor layout

Evidence of Progress for 2003-2004:

Percent complete 100%

Activities planned for 2004-2005:

Remove wall

☑ Improved communication for Special Events to reduce impact on Campus Community.

**Campus Planning Theme:** Best Practices  
**Secondary Goals:**  
**Sub Unit:** Police  
**Time Frame:** FY2001 and on-going

Actions taken for 2003-2004:

Established committee to review processes for special events and development appropriate notification processes. Special Events Forms introduced.

Evidence of Progress for 2003-2004:

Adequate notification of Special Events on campus.

Activities planned for 2004-2005:

Will continue to monitor the Special Events on campus to assure continued communication. Require feedback from Event Planners.
Make citation payments available over the web via credit card transactions.

**Campus Planning Theme:** Best Practices  
**Secondary Goals:**  
**Sub Unit:** Parking  
**Time Frame:** To be completed in FY04/05.

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**Actions taken for 2003-2004:**

Webpage development underway with completion in late Fall 2004.

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**Evidence of Progress for 2003-2004:**

When customers are able to pay citations online.

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**Activities planned for 2004-2005:**

Update the webpage with the new program.

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Promote customer service collaboration and cooperatives across ADFI and other partner departments.

**Campus Planning Theme:** Best Practices  
**Secondary Goals:**  
**Sub Unit:** None  
**Time Frame:** Continuous

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**Actions taken for 2003-2004:**

- null

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**Evidence of Progress for 2003-2004:**

Completion of phased releases.

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**Activities planned for 2004-2005:**

- **OneCard:** Ability to place aid credit onto OneCard.  
- **Police Dept:** Move of Banking Services within the Police facility, and coordinate and share cost of security surveillance and alarm system.  
- **Childcare:** Coordinate and joint mailing of information to students.  
- **Parking:** Coordinate joint mailings for cost reduction, and expansion of on-line data transmissions.  
- **Payroll:** Establish process for payment of fellowships.  
- **Depositing units:** Develop more direct depositing relationships.  
- **Admissions:** Transition payment processes to four accepting departments as a result of SIS changes.
Admissions: Transition payment processes to four accepting departments as a result of SIS changes.
Financial Aid: Train staff, transfer line and staff member to Enrollment Services to support frontline services there.
Scholarships: Provide direct posting access.

☑ Promote web-based ACH Payment processing

**Campus Planning Theme:** Best Practices
**Secondary Goals:**
**Sub Unit:** Bursar
**Time Frame:** FY 2002 and on-going

Actions taken for 2003-2004:

Have moved from WebACH to QuikPAY for electronic check presentation. Have advertised and received payments through QuikPAY and removed WebACH capability. Helped develop the reconciliation process for other campuses.

Evidence of Progress for 2003-2004:

Number of enrollees, users, and measure of shift from credit card usage.

Activities planned for 2004-2005:

Respond to questions from customers for all campuses via email through "cq contact us". Help with the development of QP for credit card usage in preparation of pay-by-phone downgrade.

☑ Provide prospective customers with clear, concise information about University Place

**Campus Planning Theme:** Best Practices
**Secondary Goals:**
**Sub Unit:** Conf Center
**Time Frame:** FY 2004

Actions taken for 2003-2004:

Begin redesign of UP web site

Evidence of Progress for 2003-2004:

Ease of navigation and use

Activities planned for 2004-2005:

Complete web site redesign and be full operational

☑ Provide research based curriculum that is age, individually, and culturally appropriate as identified within the 5-Year Strategic Plan.
Strategic Plan

Campus Planning Theme: Best Practices
Secondary Goals:
Sub Unit: Center for Young Children
Time Frame: 2003/2004 and on-going

Actions taken for 2003-2004:
added Spanish to the daily classroom activities

Evidence of Progress for 2003-2004:
Goals identified within the 5-Year Strategic Plan met

Activities planned for 2004-2005:
Review current curriculum and explore the possibilities of additional extra-curricular activities

新たに高品質なスタッフを招聘し、専門的な開発機会を提供する。5年間の戦略計画に従って。

Campus Planning Theme: Best Practices
Secondary Goals:
Sub Unit: Center for Young Children
Time Frame: 2003/2004 and on-going

Actions taken for 2003-2004:
staff engages in ongoing professional development

Evidence of Progress for 2003-2004:
Goals identified within the 5-Year Strategic Plan met

Activities planned for 2004-2005:
Add assistant teacher level positions to classrooms, provide individualized professional development plans for all staff, develop tools for inclusive evaluations that involve all stakeholders for each position, establish a recruitment, retention and recognition plan for staff members

新たに高品質なスタッフを招聘し、専門的な開発機会を提供する。5年間の戦略計画に従って。

Campus Planning Theme: Best Practices
Secondary Goals:
Sub Unit: HRA
Time Frame: FY2004 and on-going

Reduce cycle time to fill vacant positions. Review background check process.
Time frame: FY 2004 and on-going

Actions taken for 2003-2004:

Reviewed processes and reduced the total average time to fill vacant positions.

Evidence of Progress for 2003-2004:

Total Cycle times for filling positions.

Activities planned for 2004-2005:

Will continue to review processes to decrease fill times. Flow-chart the background check process.

☐ Review of Campus Emergency Phones for remote monitoring
  
  Campus Planning Theme: Best Practices
  Secondary Goals:
  Sub Unit: Police
  Time Frame: FY2002

Actions taken for 2003-2004:

Reviewing hardware for compatibility issues.

Evidence of Progress for 2003-2004:

Reduced downtime for emergency phones

Activities planned for 2004-2005:

Goal is to allow for remote monitoring of equipment to ensure working conditions to provide the highest level of service. Purchase Software to insure all phones work reliably.

☐ To complete inventories for the RCs that are due this year
  
  Campus Planning Theme: Best Practices
  Secondary Goals:
  Sub Unit: Accounting
  Time Frame: FY 2004-05

Actions taken for 2003-2004:

Identified RC’s and began running reports
Evidence of Progress for 2003-2004:

Inventory Certification form signed by RC Fiscal Officer

Activities planned for 2004-2005:

To work with RC’s to find and update all of their capital assets

☑️ To redesign and reorganize campus mail delivery process - to enhance service level standards via customer service expectations, times standards, and feedback.

**Campus Planning Theme:** Best Practices

**Secondary Goals:**

**Sub Unit:** CDPM

**Time Frame:** October 4, 2004 (On-going)

Actions taken for 2003-2004:

Reorganized and restructured mail operation through benchmarking efforts, process improvement and cost analysis.

Evidence of Progress for 2003-2004:

Cost Balance and process improvement.

Activities planned for 2004-2005:

Develop a Feasibility Study to include cost analysis, process analysis, cost balance, and benchmarking criteria of "like" organizations/operations to identify operational and technological efficiencies.

☑️ Work with Registrar and Learning Environment Committee to improve informal and formal learning environments

**Campus Planning Theme:** Teaching and Learning

**Secondary Goals:**

**Sub Unit:** CFS

**Time Frame:** FY2002 and on-going

Actions taken for 2003-2004:

Computerized general inventory classroom preventive maintenance program. Met a couple of times with Registrar and UITS. Used UITS system to automate file of pictorial room set ups. Developed posting methodology for pictorial room setups.

Evidence of Progress for 2003-2004:
Classroom conditions will be reliably improved

Activities planned for 2004-2005:

Fully implement system to inspect/document classroom conditions and set ups. Review scheduling software with Registrar’s Office to determine best system for documentation.

3. Promote IUPUI Identity

Rebirth of the sales/marketing effort.

Campus Planning Theme: Best Practices
Secondary Goals:
Sub Unit: Conf Center

Actions taken for 2003-2004:

All listed activities are on-going.

Evidence of Progress for 2003-2004:

Slight uptick in bookings for 2005.

Activities planned for 2004-2005:

New sales managers will train/work with seasoned conference managers. Prospect former customers; set specific goals for weekly number of contacts and site visits.

Collaborate with Career Center and University College to promote student employment at IUPUI.

Campus Planning Theme: Best Practices
Secondary Goals:
Sub Unit: HRA
Time Frame: FY2004 and on-going

Actions taken for 2003-2004:

Identify target areas for student employment.

Evidence of Progress for 2003-2004:

Increase in the number of student employees.
Activities planned for 2004-2005:

Will continue to collaborate with Student areas to identify potential student employment opportunities; partner with IMIR to gather baseline data and evaluate program effectiveness.

☑ Develop effective marketing plan to ensure that staff, faculty and students are aware of HR services.

**Campus Planning Theme:** Best Practices  
**Secondary Goals:**  
**Sub Unit:** HRA  
**Time Frame:** FY2004 and on-going

**Actions taken for 2003-2004:**

Identified key areas of service.

**Evidence of Progress for 2003-2004:**

Greater awareness and utilization of HR consulting services.

**Activities planned for 2004-2005:**

Collaborate with Communication & Marketing to develop theme/materials.

☑ Develop external training capability  

**Campus Planning Theme:** Best Practices  
**Secondary Goals:**  
**Sub Unit:** Police  
**Time Frame:** Ongoing

**Actions taken for 2003-2004:**

Starting to attract nationally known presenter to campus for police training sessions. Presentation of initial programs.

**Evidence of Progress for 2003-2004:**

Numbers of sessions arranged, numbers of officers trained, evaluation results

**Activities planned for 2004-2005:**

Initial sessions will deal with handling critical incidents, domestic violence prevention and police interview techniques.
Expand Employee Benefits to include self-service.

Campus Planning Theme: Best Practices
Secondary Goals:
Sub Unit: HRA
Time Frame: FY2004 and on-going

Actions taken for 2003-2004:
Implement first phase of HRMS and Benefits Administration module.

Evidence of Progress for 2003-2004:
Faculty and staff having ability to make changes to benefits online.

Activities planned for 2004-2005:

Implement inspection protocol and preventive maintenance for campus signage, sidewalks and turf

Campus Planning Theme: Best Practices
Secondary Goals:
Sub Unit: CFS
Time Frame: FY2002 and on-going

Actions taken for 2003-2004:
Collected some data manually. Developed protocols. Managers have been trained on MMS PM module and have developed pm programs for equipment, sidewalks, signage, drains and chemical inventory. Met with consultant to discuss tree maintenance program for trees in Ball/Rotary Greenway.

Evidence of Progress for 2003-2004:
IUPUI curb appeal will be enhanced by better maintenance of landscape features and the equipment used to maintain them.

Activities planned for 2004-2005:
Unique identification #s for signs and sidewalks sections are being developed now that the landscape layer of CAD has been developed. MMS will be used to track.

Increase awareness of Employee Benefits.
Campus Planning Theme: Best Practices
Secondary Goals:
Sub Unit: HRA
Time Frame: FY2004 and on-going

Actions taken for 2003-2004:

Expand the IUPUI Reputation building by increasing awareness of substantial employee benefit programs

Evidence of Progress for 2003-2004:

Awareness of employee benefit programs

Activities planned for 2004-2005:

Will continue to market employee benefits to attract and retain employees

✔ Increased usage of Jagtag.

Campus Planning Theme: Best Practices
Secondary Goals:
Sub Unit: JagTag
Time Frame: On-going.

Actions taken for 2003-2004:

Implemented Merchant of the Month. Partnered with Jags Bookstore to create the Jagtag Featured Item of the Month. Jagtag now has calling card capability. McDonald’s, Ginas Coffee & Tea Co, DS Patient Services and IKON now on board.

Evidence of Progress for 2003-2004:

Number of Jagtag transactions and the number of vendors accepting the Jagtag as a form of payment increase. Number of vending readers on-line. Number of new partnerships created. Number of new usages for the card.

Activities planned for 2004-2005:

Continued joint promotions between Jagtag and other merchants to offer discounts to Jagtag users. Survey customers for new and innovative uses for Jagtag. Ensure Jagtag is widely accepted by identifying venues left on and off campus not yet accepting Jagtag.

✔ Make the experience and expertise of departmental personnel more widely known and understood in the community

Campus Planning Theme: Best Practices
Secondary Goals:
Sub Unit: Police
Time Frame: FY2002-03

Actions taken for 2003-2004:
Departmental personnel participating in a variety of regional police endeavors

Evidence of Progress for 2003-2004:
External recognition

Activities planned for 2004-2005:
Publicize the accomplishments of personnel who are involved in endeavors beyond the scope of normal duties

Physical relocation of Police Department
Campus Planning Theme: Best Practices
Secondary Goals:
Sub Unit: Police
Time Frame: FY2002-3

Actions taken for 2003-2004:
Preplan for design of occupancy. Preplan completed and approved.

Evidence of Progress for 2003-2004:
Completion of move.

Activities planned for 2004-2005:
Staged movement of daily and 24 hour operations. Development of new dispatch center and ancillary service area. Construction of new Dispatch Center - physical relocation of Department.

Position University Place as the facility of choice for administrative/academic/sport departments of IUPUI, IU, Purdue and affiliated campuses
Campus Planning Theme: Best Practices
Secondary Goals:
Sub Unit: Conf Center
Time Frame: FY2001 and on-going

Actions taken for 2003-2004:
Market University Place Conference Center to IU and Purdue planners

Evidence of Progress for 2003-2004:

Number of conferences booked from these institutions

Activities planned for 2004-2005:

Continue to make contacts with IU and Purdue planners

☑ Send Conference Center staff to market in "feeder cities" in Great Lakes area cities
Campus Planning Theme: Best Practices
Secondary Goals:
Sub Unit: Conf Center
Time Frame: FY2001 and on-going

Actions taken for 2003-2004:

Target "feeder cities" in the Great Lakes area cities for marketing opportunities

Evidence of Progress for 2003-2004:

Number of conferences booked from these areas

Activities planned for 2004-2005:

Will continue to plan marketing projects for the "feeder cities"

☑ 4. Development of Facilities for IUPUI

☑ Investigate Options for securing facilities audit’
Campus Planning Theme: Best Practices
Secondary Goals:
Sub Unit: CFS

Actions taken for 2003-2004:

None

Evidence of Progress for 2003-2004:
An automated facilities’ audit is complete and the amount and nature of campus deferred maintenance is understood and managed effectively.

Activities planned for 2004-2005:

Gather data. Get prices

- Reconfigure warehouse storage space and racks - Reengineer Warehouse storage space
  
  **Campus Planning Theme:** Best Practices  
  **Secondary Goals:**  
  **Sub Unit:** Bookstore  
  **Time Frame:** FY 2004

Actions taken for 2003-2004:

- Design floor layout

Evidence of Progress for 2003-2004:

- 100%

Activities planned for 2004-2005:

- Add shelving

- Adequate funding model for utilities for facilities
  
  **Campus Planning Theme:** Best Practices  
  **Secondary Goals:**  
  **Sub Unit:** CFS  
  **Time Frame:** FY2001 and on-going

Actions taken for 2003-2004:

- Review of projected expenses – increased awareness of conservation efforts. Increased fund balance which can serve as utility reserve.

Evidence of Progress for 2003-2004:

- Utilities funding is stable. Variances do not jeopardize operating priorities associated with either maintaining campus facilities or other campus operating priorities.
Activities planned for 2004-2005:

Monitor of budget to actual variances and continue to enhance fund balance.

☑ Adequate parking facilities for students, faculty, staff and visitors

**Campus Planning Theme:** Best Practices  
**Secondary Goals:**  
**Sub Unit:** Parking  
**Time Frame:** On-going

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Actions taken for 2003-2004:

Currently under construction to be completed Fall 2004. Opening will occur with start of Fall Semester.

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Evidence of Progress for 2003-2004:

Increased satisfaction in student and staff surveys.

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Activities planned for 2004-2005:

Construction completion and assume control of Barnhill Parking Garage.

☑ Continued enhancement of Conference Center to maintain world-class status for IUPUI

**Campus Planning Theme:** Best Practices  
**Secondary Goals:**  
**Sub Unit:** Conf Center  
**Time Frame:** FY2001 and ongoing

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Actions taken for 2003-2004:

Bi-annual refurbishing

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Evidence of Progress for 2003-2004:

Ability to continue to attract high level leadership conferences and positive customer feedback

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Activities planned for 2004-2005:

New carpet and wallcovering on first floor; meeting room furniture update; technology as market driven

☑ Design/establish/setup a C-store in the new student housing building - Implement new C-store

**Campus Planning Theme:** Best Practices
Secondary Goals:
Sub Unit: Bookstore
Time Frame: FY 2004

Actions taken for 2003-2004:
Design C-store layout

Evidence of Progress for 2003-2004:
100%

Activities planned for 2004-2005:
Develop blueprints

- Develop internal benchmark indicators for building operation performance

Campus Planning Theme: Best Practices
Secondary Goals:
Sub Unit: CFS
Time Frame: FY2002 and on-going

Actions taken for 2003-2004:
Building Services benchmarks have been established. Utilities benchmarks have been established.

Evidence of Progress for 2003-2004:
Data will be available for evaluating building operational performance

Activities planned for 2004-2005:
Grounds benchmarks will be established. A strategy for developing Maintenance benchmarks will be developed

- Implement appropriate metering and energy management program. Develop funding strategy in collaboration with the campus community

Campus Planning Theme: Best Practices
Secondary Goals:
Sub Unit: CFS
Time Frame: Fy2002 and on-going

Actions taken for 2003-2004:
Implemented many energy savings projects. Developed draft energy policy and plan. Developed estimate for meter installation program and installed a few meters as budget was available. Revised building operating cost data with estimates of energy useage where meter data is not available and submitted data for use with indirect cost negotiations.

Evidence of Progress for 2003-2004:

Building specific data will be collected and used to evaluate energy management programs

Activities planned for 2004-2005:

Install electric meters on 90% of campus buildings. Review energy policy/plan and revise as appropriate

☑ New Building Project support

Campus Planning Theme: Best Practices
Secondary Goals:
Sub Unit: CFS
Time Frame: FY2001 and on-going

Actions taken for 2003-2004:

Continue to provide support to building projects from CFS, Environmental Health and other ADFI units. Drawings reviewed. Punchlist involvement by Zone Managers. Will support the opening of ICTC in August 2004.

Evidence of Progress for 2003-2004:

Success of building projects

Activities planned for 2004-2005:

Will continue to assist with building projects

☑ Partner with UAO to develop architectural/engineering consultant review process

Campus Planning Theme: Best Practices
Secondary Goals:
Sub Unit: CFS
Time Frame: FY2002 and on-going

Actions taken for 2003-2004:

Informal discussions have occurred.
Evidence of Progress for 2003-2004:

Quality consultants will get more work on campus than those who do not perform well

Activities planned for 2004-2005:

A documented process through the UAO is not likely. However, proactive assessment of consultant performance will continue to be provided to the UAO University Engineer.

☑ Partner with UAO to refine design standards
   Campus Planning Theme: Best Practices
   Secondary Goals:
   Sub Unit: CFS
   Time Frame: FY2002 and on-going

Actions taken for 2003-2004:

UAO has drafted standards. CFS has provided input in recent meetings. More revisions planned. Meetings and refinements continue.

Evidence of Progress for 2003-2004:

Implementation of design standards that are consistent with efficient and effective IUPUI building operations

Activities planned for 2004-2005:

Continue to provide information for amending standards to be more consistent with campus operational needs

☑ Review of funding model to ensure adequate resources for environmental services for rapidly growing research facilities
   Campus Planning Theme: Best Practices
   Secondary Goals:
   Sub Unit: EHS
   Time Frame: FY2004-05 and on-going

Actions taken for 2003-2004:

Have identified shortcomings in the funding of new buildings as it relates to services provided by the Dept of Environmental Health & Safety.

Evidence of Progress for 2003-2004:

Increased department funding for environmental health and safety services
Activities planned for 2004-2005:

Continue to work to identify potential funding sources for services for new research facilities and academic buildings.

**Secure Plant Expansion funding for University Facilities**

**Campus Planning Theme:** Best Practices  
**Secondary Goals:**  
**Sub Unit:** CFS  
**Time Frame:** FY2001 and on-going

Actions taken for 2003-2004:

Worked with University Administration and the State to justify plant expansion funding. Refined operating cost data from which extrapolations of new building operating costs are drawn.

Evidence of Progress for 2003-2004:

Adequate plant expansion funding for operating new buildings.

Activities planned for 2004-2005:

Will continue to Work with University Administration and the State to justify plant expansion funding and to make sure that request for funding is accurate.

**Student Center Mail Facility-test**

**Campus Planning Theme:** Best Practices  
**Secondary Goals:**  
**Sub Unit:** CDPM  
**Time Frame:** Ongoing

Actions taken for 2003-2004:

Work has been done on the floor plan design.

Evidence of Progress for 2003-2004:

Mail facility operational in Student Center

Activities planned for 2004-2005:

Worked with the designer on floor plans.
5. Increased collaboration within IUPUI and with community

`Assist IKON with sales and marketing opportunities.`

**Campus Planning Theme:** Best Practices  
**Secondary Goals:**  
**Sub Unit:** CDPM  
**Time Frame:** On-going.

**Actions taken for 2003-2004:**

Various departments and schools have had a presentation and other depts./schools will be scheduled (i.e., addressing UP Conference Center sales/planning managers in November). Flyer being designed to give customers when job is delivered.

**Evidence of Progress for 2003-2004:**

Increase in sales

**Activities planned for 2004-2005:**

Department, school presentations; brochures and flyers to acquaint campus with IKON services.

`collaboration with other IUPUI departments sub objective: communicate campus wellness opportunities`  
**Campus Planning Theme:** Best Practices, Campus Climate for Diversity  
**Secondary Goals:**  
**Sub Unit:** Natatorium  
**Time Frame:** ongoing - current

**Actions taken for 2003-2004:**

- HRA, has promoted sample aquatic fitness classes to the campus population  
- rec sports and sport complex cross promote one another

**Evidence of Progress for 2003-2004:**

increased enrollment in classes, the need for additional classes.  
increased calls/inquiries regarding ‘wellness’ opportunities

**Activities planned for 2004-2005:**

- sample classes, lectures given
`collaboration with other IUPUI departments sub objective: create ongoing relationship with Herron School of Art`

**Campus Planning Theme:** Campus Climate for Diversity

**Secondary Goals:**

Sub Unit: Natatorium

**Time Frame:** currently in progress

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**Actions taken for 2003-2004:**

- summer ’04 IUPUI Sport Complex Summer Camp and Herron Art Camps will combine forces
- Herron students are creating camp brochures as a student

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**Evidence of Progress for 2003-2004:**

- increased revenue in both camps
- increased exposure for both

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**Activities planned for 2004-2005:**

- partner on summer camps
- utilize student talents
- partner on special events

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`collaboration with other IUPUI departments sub objective: encourage contacts to utilize upcc`

**Campus Planning Theme:** Campus Climate for Diversity

**Secondary Goals:**

Sub Unit: Natatorium

**Time Frame:** current - ongoing

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**Actions taken for 2003-2004:**

- always list upcc first and vocalize the benefits to the close proximity
- remember upcc in conversations with associations that may consider Indianapolis for conferences
- take upcc info along when displaying
- partner with upcc when appropriate at trade shows

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**Evidence of Progress for 2003-2004:**

increased sports traffic at upcc

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**Activities planned for 2004-2005:**

notify upcc of any potential business continue to promote upcc
'Complete campuswide training assessment.'

**Campus Planning Theme:** Best Practices  
**Secondary Goals:**  
**Sub Unit:** HRA  
**Time Frame:** FY2004 and ongoing

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**Actions taken for 2003-2004:**

Review 2003 staff survey, PCPD and training needs assessment.

---

**Evidence of Progress for 2003-2004:**

Comprehensive training needs assessment serves as foundation for campuswide training and development plan.

---

**Activities planned for 2004-2005:**

Gather data from staff survey, PCPD and other sources to assess needs; create process for conducting additional needs assessment with stakeholders.

---

'Create and build partnerships within ADFI, other university departments and third-party merchants to help achieve shared goals.'

**Campus Planning Theme:** Best Practices  
**Secondary Goals:**  
**Sub Unit:** JagTag  
**Time Frame:** On-Going.

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**Actions taken for 2003-2004:**

Chartwells has been our Merchant of the Month; We've contacted other merchants/departments to be future Merchants of the Month. Several merchants/departments have been our Merchant of the Month more than once.

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**Evidence of Progress for 2003-2004:**

Partnering with departments for cost-sharing of home mailers; Promotions offered to customers. More readers are installed on vending machines in buildings where none currently exist.

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**Activities planned for 2004-2005:**

Continuing partnering with JagsBookstores on the Jagtag Featured item of the Month program; Work more closely with Chartwells Food Company for joint promotions and expanded card usage in each of their locations. Continue building Merchant of the Month program by partnering with a different vendor each month. Work with Food Services to install readers on additional vending machines.
Decrease costs while increasing productivity. Collaboration with other IUPUI departments sub objective: further development of staff / resource sharing.

**Campus Planning Theme:** Best Practices  
**Secondary Goals:**  
**Sub Unit:** Natatorium  
**Time Frame:** current

**Actions taken for 2003-2004:**

Held organizational meeting. Next step will be to bring in decision makers to review.

**Evidence of Progress for 2003-2004:**

increased sales for all areas involved.

**Activities planned for 2004-2005:**

further discussion on possibly sharing a sales position with Intercollegiate Athletics.

Develop a business relationship with IUPUI Community Learning Network (CLN) to provide their textbooks. The CLN Continuing Studies Noncredit Programs operates the largest continuing education program in Indiana. Each year CLN provides more than 900 continuing education classes and serves over 11,000 learners in central Indiana.

**Campus Planning Theme:** Best Practices  
**Secondary Goals:**  
**Sub Unit:** Bookstore  
**Time Frame:** Fiscal year 2004-2005

**Actions taken for 2003-2004:**

Define business opportunities, risks and benefits  
Develop marketing and business operation plans  
Initiate meetings

**Evidence of Progress for 2003-2004:**

Completion of business case document  
Completion of marketing and business operations plan document  
Conducted meetings

**Activities planned for 2004-2005:**

Work with the Dean of the CLN programs on developing business relationships that support the needs of the CLN and IUPUI
Develop a masters certificate curriculum in select areas.

**Campus Planning Theme:** Best Practices

**Secondary Goals:**

**Sub Unit:** HRA

**Time Frame:** FY2004 and ongoing

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Actions taken for 2003-2004:

Attend nationally recognized programs on these topics and refine content for certificate program.

---

**Evidence of Progress for 2003-2004:**

A masters certificate program is developed and ready for implementation for fall 2005.

---

**Activities planned for 2004-2005:**

Research and identify program content related to communications, conflict and negotiations.

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Develop opportunities to cross market/promote goods and services with Food Services, Athletics, Parking Services, JagTag, University Library and Academic Departments.

**Campus Planning Theme:** Best Practices

**Secondary Goals:**

**Sub Unit:** Bookstore

**Time Frame:** Fiscal 2004-2005

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Actions taken for 2003-2004:

Participate in meetings with other departments to facilitate and promote cross selling opportunities.

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**Evidence of Progress for 2003-2004:**

Completion of marketing materials
Completion of scheduling meetings with other departments
Completion of implementation of developed cross selling opportunities

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**Activities planned for 2004-2005:**

Continue to work with other departments to seek opportunities to promote and enhance sales/revenue through cross marketing of goods and services.

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Develop training series certificate program for PA non-supervisory staff.
Campus Planning Theme: Best Practices  
Secondary Goals:  
Sub Unit: HRA  
Time Frame: FY 2004 and ongoing

Actions taken for 2003-2004:

Pilot a version of the program with Staff Council via monthly meetings.

Evidence of Progress for 2003-2004:

A training series is developed and ready for implementation for Fall 2005.

Activities planned for 2004-2005:

Research and identify topics relevant to professional non-supervisory roles. Pilot several programs and obtain feedback.

Expand our availability and services to regional bursars on their collection needs.

Campus Planning Theme: Best Practices  
Secondary Goals:  
Sub Unit: Delinquent Acct Services  
Time Frame: On going

Actions taken for 2003-2004:

Reminding bursars of our presence

Evidence of Progress for 2003-2004:

Continuation

Activities planned for 2004-2005:

Continue to assist bursars in all collections aspects

Identify cultural connection for grant opportunities. Identify means of funding sports sub objective: special events

Campus Planning Theme: Campus Climate for Diversity  
Secondary Goals:  
Sub Unit: Natatorium  
Time Frame: beginning end of FY04

Actions taken for 2003-2004:
relationship already established with Herron (see next goal) on other subjects

Evidence of Progress for 2003-2004:

- receive grant money
- increased exposure for the campus and specifically Herron

Activities planned for 2004-2005:

Herron School of Art connection with special events

☑ increase quantity of exposures through sharing booth space. collaboration with other IUPUI departments sub objective: expand outreach potential through partnerships

Campus Planning Theme: Best Practices, Campus Climate for Diversity

Secondary Goals:

Sub Unit: Natatorium

Time Frame: Currently ongoing

Actions taken for 2003-2004:

In ’04 have shared space at six different events. Will be meeting this month to look at ’05 opportunities.

Evidence of Progress for 2003-2004:

Increased customer base, calls, and web site hits.

Activities planned for 2004-2005:

share booth space at community events such as Circlefest, 500 Festival Kids Day, HRA Health & Benefits Fair, etc with departments such as IUPUI Communications and Marketing and Recreational Sports.

☑ Meet with NIFS officials to discuss the possibility of using their parking lot during some of our larger tournaments.

Campus Planning Theme: Best Practices, Civic Engagement

Secondary Goals:

Sub Unit: Tennis Center

Time Frame: Start 2005

Actions taken for 2003-2004:

Evidence of Progress for 2003-2004:
Activities planned for 2004-2005:

Set up a meeting with NIFS Director of Parking Services.

☑ 'Strengthen diversity initiatives related to recruitment and retention.'

**Campus Planning Theme:** Best Practices  
**Secondary Goals:**  
**Sub Unit:** HRA  
**Time Frame:** FY2004 and on-going

Actions taken for 2003-2004:

Revamped Diversity Awareness workshops and continually offer. Actively engage in Diversity Corps.

Evidence of Progress for 2003-2004:

Increased numbers of under-represented groups are hired and retained; climate for diversity is improved.

Activities planned for 2004-2005:

Increase professional development opportunities on diversity topics; provide additional support and consultation to hiring managers.

☑ 'Work to improve construction and renovation processes related to environmental health and safety issues'

**Campus Planning Theme:** Campus Climate for Diversity  
**Secondary Goals:**  
**Sub Unit:** EHS  
**Time Frame:** FY2004-05 and on-going

Actions taken for 2003-2004:

Continue to attend construction related meetings and provide input

Evidence of Progress for 2003-2004:

Increased environmental health and safety awareness within the community

Activities planned for 2004-2005:

Create policies to help improve efficiency of processes
Collaborate with other IUPUI/IU entities and City of Indianapolis to meet Phase II storm water regulations.

**Campus Planning Theme:** Best Practices

**Secondary Goals:**

**Sub Unit:** CFS

**Time Frame:** FY2004-05

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**Actions taken for 2003-2004:**

A university steering committee has been appointed and has met. Outside Counsel has been retained. A couple of meetings have been held. Investigating the possibility of joining with City’s permit.

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**Evidence of Progress for 2003-2004:**

Data accumulated, entities’ responsibilities outlined and legal requirements fulfilled.

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**Activities planned for 2004-2005:**

When answers to questions developed for the City consultant have been answered, another meeting will be held and responsibilities will be clarified.

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Collaborate with University Library Archives to develop combined drawing database.

**Campus Planning Theme:** Best Practices

**Secondary Goals:**

**Sub Unit:** CFS

**Time Frame:** fy2004-2005

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**Actions taken for 2003-2004:**

Have shared drawings. Archives database cleaned up. Developed one database with search capabilities. Next step is for database to be put on the web.

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**Evidence of Progress for 2003-2004:**

IUPUI and Bloomington personnel will be able to search all drawings’ archives with one search.

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**Activities planned for 2004-2005:**

Implement internet access to database.

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Ensure research compliance with the Patriot Act

**Campus Planning Theme:** Research, Scholarship and Creative Activity

**Secondary Goals:**

**Sub Unit:** EHS
Time Frame: FY 2004-05 and on-going

Actions taken for 2003-2004:

Hired a Biosafety Officer, obtained lists from research community regarding biological agents used

Evidence of Progress for 2003-2004:

Implementation of the above.

Activities planned for 2004-2005:

Inspect lab, complete Biosafety Manual, implement monthly biosafety training sessions, provide necessary forms to regulatory agencies, serve on biosafety committees

☐ Explore ways to improve our commitment to serving our customers and departments.
  
  Campus Planning Theme: Best Practices
  
  Secondary Goals:
  
  Sub Unit: Delinquent Acct Services
  
  Time Frame: FY 2004 and on-going

Actions taken for 2003-2004:

Listen to customers, discuss with other universities.

Evidence of Progress for 2003-2004:

Quick and accurate collections of debts for customers.

Activities planned for 2004-2005:

null

☐ Implement system of emergency radios for departments to receive Public Safety announcements
  
  Campus Planning Theme: Research, Scholarship and Creative Activity
  
  Secondary Goals:
  
  Sub Unit: EHS
  
  Time Frame: FY2004-05 and on-going

Actions taken for 2003-2004:

Have identified a system used at another campus as a model
Evidence of Progress for 2003-2004:

System of emergency radios purchased by several departments and receiving emergency broadcasts.

Activities planned for 2004-2005:

Research technical data, obtain radios, provide information to departments, sell/furnish radios to departments

☐ Increase Organizational Development consulting skills for HRA staff members.

Campus Planning Theme: Best Practices  
Secondary Goals:  
Sub Unit: HRA  
Time Frame: FY2004 and ongoing

Actions taken for 2003-2004:

Monthly sessions with OD facilitator; specialty training conferences attended by several HRA consultants.

Evidence of Progress for 2003-2004:

Campus units take advantage of OD facilitation for accelerated process improvement.

Activities planned for 2004-2005:

Provide ongoing regular OD training for HRA consultants; partner with PAII on process improvement.

☐ Increase the number and type of events at the IUPUI Sport Complex  
Campus Planning Theme: Civic Engagement  
Secondary Goals:  
Sub Unit: Natatorium  
Time Frame: On-going

Actions taken for 2003-2004:

Synchronized swimming event coming in June, 04; Bid on other events such as water polo, lacrosse; new streams of revenue through facilities

Evidence of Progress for 2003-2004:

When bids are awarded to our facilities
Activities planned for 2004-2005:

Bid for ’07 Track & Field Championships; attend Teams 2003 Event Conference in Nov. 2003; research new event opportunities

☑ Involve National Art Museum of Sport with surrounding cultural institutions

Campus Planning Theme: Civic Engagement
Secondary Goals:
Sub Unit: Conf Center
Time Frame: FY2001 and on-going

Actions taken for 2003-2004:

Continue to pursue activities to collaborate with surrounding institutions

Evidence of Progress for 2003-2004:

Increased events and projects

Activities planned for 2004-2005:

Cohost w/NCAA the annual Internal Association of Sports Museums and Halls of Fame in 10/03

☑ Negotiate additional referral contracts within ADFI and throughout the campus.

Campus Planning Theme: Best Practices
Secondary Goals:
Sub Unit: Delinquent Acct Services
Time Frame: FY 2004 and beyond

Actions taken for 2003-2004:

Information of our availability.

Evidence of Progress for 2003-2004:

More department contracts.

Activities planned for 2004-2005:

null
Participate in Diversity Roundtable of Central Indiana.

**Campus Planning Theme:** Campus Climate for Diversity

**Secondary Goals:**

**Sub Unit:** HRA

**Time Frame:** FY2004 and on-going

Actions taken for 2003-2004:

Participate in Diversity meetings and professional development events.

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**Evidence of Progress for 2003-2004:**

Increased awareness of diversity issues. Stronger relationships with community organizations.

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**Activities planned for 2004-2005:**

Continue to participate in Central Indiana committees.

Partner with Clarion to improve outside appearance of University and Riley

**Campus Planning Theme:** Campus Climate for Diversity

**Secondary Goals:**

**Sub Unit:** CFS

**Time Frame:** FY2002 and on-going

Actions taken for 2003-2004:


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**Evidence of Progress for 2003-2004:**

Improved appearance of University and Riley which adds to the campus curb appeal.

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**Activities planned for 2004-2005:**

Evaluate improvements. Continue walkthroughs and activities consistent with enhanced maintenance plan.

Partner with School of Medicine and other schools with bench research to reduce barriers for principal investigators

**Campus Planning Theme:** Best Practices

**Secondary Goals:**

**Sub Unit:** CFS

**Time Frame:** fy2002 and ongoing
Actions taken for 2003-2004:

Meetings held. School of Medicine will centralize payment of building-related charges that are not covered by Building Maintenance. Had discussions with School of Medicine regarding CFS’ provision of an equipment technician. Developed list of maintenance items in conjunction with SOM Facilities. Discussed options for providing painting services more cheaply and more quickly.

Evidence of Progress for 2003-2004:

Principal investigators will not be bothered with nuisance requests for facility-related charging information

Activities planned for 2004-2005:

Implement "enhanced maintenance" in research buildings, identify issues and resolutions. Identify funding

☑ Promote increased activity with minority vendors

**Campus Planning Theme:** Campus Climate for Diversity

**Secondary Goals:**

**Sub Unit:** Purchasing

**Time Frame:** FY2001 and on-going

Actions taken for 2003-2004:

Promote increased activity with minority vendors to achieve University goals; sponsored technology training sessions for minority vendors to learn small business apps. sponsored seminars for MBE and WBEs and Historically Underutilized Small Business’s

Evidence of Progress for 2003-2004:

Increased minority vendor purchases by 10% in FY2002

Activities planned for 2004-2005:

Continue to discuss and promote minority opportunities with departments.

☑ Promote redistribution of University surplus property

**Campus Planning Theme:** Best Practices

**Secondary Goals:**

**Sub Unit:** Purchasing

**Time Frame:** FY 2001 and on-going

Actions taken for 2003-2004:
Marketing and holding weekly open house events at the warehouse for campus departments. Utilizing listservs to advertise items available

Evidence of Progress for 2003-2004:
Over $3m of assets were redistributed

Activities planned for 2004-2005:
Continue to expand redistribution efforts to maximize the utilization of University assets by improving the warehouse display area for more effective viewing and presentation of items. Setting up functional computer systems for testing and preview; establishing a web folio of items on hand.

☑ Provide lab safety inspections to ensure safety and to ensure that NIH requirements are met

**Campus Planning Theme:** Research, Scholarship and Creative Activity

**Secondary Goals:**

**Sub Unit:** EHS

**Time Frame:** FY2004-05 and on-going

Actions taken for 2003-2004:
Provide lab inspections to University departments

Evidence of Progress for 2003-2004:
Continued NIH funding

Activities planned for 2004-2005:
Continue to provide lab inspections and work with departments to ensure NIH compliance

☑ Provide learning opportunities for students.

**Campus Planning Theme:** Best Practices

**Secondary Goals:**

**Sub Unit:** CFS

**Time Frame:** FY 2001 and on-going

Actions taken for 2003-2004:
Hired student interns. Engaged students in energy audits in additional buildings as their class project. Students have been hired to work in Engineering/Maintenance/Construction and in Accounting. Members of engineering staff have guest lectured in Building Construction Technology classes. Asst. VC spoke at for-credit class on leadership.
Transferred Grounds employee who is in school to learn Human Resources Management to work with CFS Human Resources during the winter season.

Evidence of Progress for 2003-2004:

Energy audits of campus buildings result in the identification of energy-saving opportunities. Students who are employed engage in hands-on learning and have higher school retention rates than students who do not work on campus. CFS staff will be sought out for their expertise for campus one-time teaching needs.

Activities planned for 2004-2005:

Continue to hire students whenever possible and to engage in classroom instruction whenever possible.

☐ Review of collection activities for University

Campus Planning Theme: Best Practices
Secondary Goals:
Sub Unit: Delinquent Acct Services
Time Frame: Fy2001 and on-going

Actions taken for 2003-2004:

Offer of central collection services from the Bursar, campus departments, and IU Regional Campuses.

Evidence of Progress for 2003-2004:

Increased collection activities

Activities planned for 2004-2005:

Will review initiative to centralize University collection activities, develop processes for accommodating new departments/schools/campuses, and initiate new services for those units.

☐ Review of research proposals involving animals

Campus Planning Theme: Research, Scholarship and Creative Activity
Secondary Goals:
Sub Unit: EHS
Time Frame: FY2004-05 and on-going

Actions taken for 2003-2004:

Provide review of research proposals involving animals to ensure compliance with regulations. Inspections of animal facilities were conducted as well
Evidence of Progress for 2003-2004:

Lack of problems with animal research facilities

Activities planned for 2004-2005:

Continue to provide review for research proposals

☑ Secure funding for a synthetic soccer field to provide a home field for IUPUI and to increase the number of events/opportunities at the Stadium

Campus Planning Theme: Civic Engagement
Secondary Goals:
Sub Unit: Natatorium
Time Frame: FY 2003/04

Actions taken for 2003-2004:

Researched companies: Met with IUPUI Athletics and IUPUI Administration and Campus Facility Services

Evidence of Progress for 2003-2004:

When field is installed

Activities planned for 2004-2005:

Continue to discuss with IUPUI Athletics and IUPUI Administration and Campus Facility Services

☑ Serve as a collaborative partner for campus community initiatives

Campus Planning Theme: Civic Engagement
Secondary Goals:
Sub Unit: CFS
Time Frame: FY 2002 and on-going

Actions taken for 2003-2004:

Provide warehouse services for Race for the Cure packet distribution and Backpack attack. Provide services for other campus priorities such as Explore IUPUI, Rock the Vote, etc..

Evidence of Progress for 2003-2004:

Campus will be able to interface with the community in a mutual beneficial fashion.
Activities planned for 2004-2005:
Continued support.

Serve as environmental health technical advisors to Clarian Health, Indiana State Department of Health and Wishard

Campus Planning Theme: Campus Climate for Diversity
Secondary Goals:
Sub Unit: EHS
Time Frame: FY2004-05 and on-going

Actions taken for 2003-2004:
Provide technical knowledge to other institutions

Evidence of Progress for 2003-2004:
Increased environmental awareness within the community

Activities planned for 2004-2005:
Continue to provide technical assistance as required

Students, faculty and staff surveys in product and service

Campus Planning Theme: Best Practices
Secondary Goals:
Sub Unit: Food Service
Time Frame: FY 2002 and ongoing

Actions taken for 2003-2004:
Comment cards; department and school visits and presentations

Evidence of Progress for 2003-2004:
Monthly review of survey results

Activities planned for 2004-2005:
Focus groups with students and staff; expansion of comment cards
Campus Planning Theme: Campus Climate for Diversity
Secondary Goals:
Sub Unit: Purchasing
Time Frame: FY 2002 and on going

Actions taken for 2003-2004:

Monthly planning meetings; bi-monthly teaching seminars for the HUSBs;

Evidence of Progress for 2003-2004:

Numbers of Certificates of Completion issued; ie first year 16 of 50 awarded. 2nd year 34 of 50 awarded

Activities planned for 2004-2005:

Continued training seminars - 6 months

Fiscal Health

*** Fiscal health report for 2004-05 is attached as PDF file. ***

Reallocation Plan

A base reallocation of $225,000 in FY2001 was to provide support for the Child Care facility. A base reallocation of $75,585 in FY2002 was to fund a BioSafety Officer position within Environmental Health and Safety. This was necessary to support the increasing research facilities on the IUPUI campus and ensure compliance with research regulations.

Other Question(s)

How do you plan to maintain/increase quality in the face of diminishing resources? What processes do you have in place to do this, for example, how are faculty involved in decision-making?

How do you cultivate a climate for diversity -- how do you recruit, develop, and retain diverse students, faculty, and staff? How do you incorporate diversity in the curriculum, in research, in civic engagement?

Five years from now what proportion of your faculty do you expect to be in the following categories: tenure track faculty, clinical faculty, research faculty, lecturers, or other academic specialties (percentages should total 100%)?

Please prepare an EXECUTIVE SUMMARY of no more than one page summarizing your most significant accomplishments of the past year (including items from the period from July 1, 2003 to the present) and the major initiatives you plan to undertake in 2004-05.