Mission

Through excellent stewardship of human, physical, and fiscal resources we will serve and lead our campus community as it fulfills its mission.

Vision

We aspire to be the very best at what we do. Every employee will be engaged, inspired, and prepared to deliver service with distinction.

Our Guiding Principles

Customer Service

We will seek to understand and focus on the needs of all customers; students, employees, and community. We will dedicate our attention to delivering exceptional services within a caring atmosphere. Collaboration and teamwork will be utilized to continually improve our services.

Integrity

Honesty, trustworthiness, dependability, and administrative/fiscal accountability will steer our actions. We are committed to maintaining and demanding high ethical standards.

Professionalism

An environment will be maintained that recognizes and respects the importance of people and opinions: one in which we celebrate our vast diversity; recognize good work; promote everyone’s abilities and professional development; establish an enjoyable environment; and encourage a balance between work and life.

Innovation

Taking risks fosters improvement. We will eliminate obstacles, encourage new ideas, and embrace creative solutions that are aimed at improvement and good stewardship.

Goals and Objectives

1. Value Continually evaluate: A. How we work; B. What services we provide, and; C. How well we provide those services; to ensure value is provided to the schools and other administrative units and to ensure that the customer experience is enhanced by interaction with our areas

Achieve sustainable customer satisfaction
Campus Planning Theme: Collaboration
Secondary Goals: Transparency
Sub Unit: Campus Facility Services
Time Frame: On-going

Actions taken for 2009-2010:

New goal

Evidence of Progress for 2009-2010:

Facilities satisfy the needs of the campus community

Activities planned for 2010-2011:

Institutionalize customer lists throughout the department by developing a database

☑ Complete transition for Accounts Payable to University Administration
Campus Planning Theme: Best Practices
Secondary Goals: Resources
Sub Unit: Financial Services
Time Frame: FY 2010, FY 2011

Actions taken for 2009-2010:

The transition to consolidate all A/P functions in FMS began in FY 2010. Duties were transferred as IUPUI A/P staff was able to secure other positions

Evidence of Progress for 2009-2010:

Completed

Activities planned for 2010-2011:

The transition will be completed in October 2010 with all functions being performed in FMS

☑ Continue expansion of Jagtag program by adding 20 additional vendors, both on campus connections and around campus & downtown connections
Campus Planning Theme: Best Practices
Secondary Goals: Resources
Sub Unit: Campus Card Services
Time Frame: On-going
Actions taken for 2009-2010:

17 vendors signed up to accept Jagtag for payment

Evidence of Progress for 2009-2010:

Jagtag successfully brought on 25 new off campus vendors accepting Jagtag for payment

Activities planned for 2010-2011:

Continue targeting areas on campus, around campus, and downtown who do not currently accept Jagtag

Create rewards & incentive programs to increase Jagtag usage & give our customers further reason to use Jagtag for payment instead of their credit/debit card

Campus Planning Theme: Best Practices
Secondary Goals: Partnerships
Sub Unit: Campus Card Services
Time Frame: 2010-2011 Fiscal Year and on-going

Actions taken for 2009-2010:

Restrictions on gaming have been lifted (University decision)

Evidence of Progress for 2009-2010:

Jagtag sales continue to increase

Activities planned for 2010-2011:

Collaborate with Jagtag vendors to provide prizes to winners

Define service levels in a declining resource environment

Campus Planning Theme: Best Practices, Collaboration
Secondary Goals: Transparency, Environment, Resources, Partnerships
Sub Unit: Campus Facility Services
Time Frame: On-going

Actions taken for 2009-2010:

Reduce service levels to cut budget by more than $1 million and communicate with campus constituencies
Evidence of Progress for 2009-2010:

Services to campus and building stewardship, within budgetary parameters

Activities planned for 2010-2011:

No budget cut requirements are known at this time

☑ Develop on-line tutorials for Bursar payments and processes
  Campus Planning Theme: Best Practices
  Secondary Goals: People
  Sub Unit: Student Account Services
  Time Frame: FY 2010, FY 2011

Actions taken for 2009-2010:

Develop and publish on-line tutorials to provide information and assistance to pay the bursar bill. Tutorials were developed for utilizing Quick Pay for echeck and credit card payments for students as well as authorized payers

Evidence of Progress for 2009-2010:

On-line tutorials were published to Bursar web site

Activities planned for 2010-2011:

Develop additional on-line tutorials to assist with Bursar transactions

☑ Implement Web Process for Requesting Surplus Pick-up
  Campus Planning Theme: Best Practices
  Secondary Goals:
  Sub Unit: Financial Services
  Time Frame: FY 2011

Actions taken for 2009-2010:

New goal

Evidence of Progress for 2009-2010:

Timely pick-up and redistribution of surplus items at IUPUI
Activities planned for 2010-2011:

Implement web request process to assist with the processing of request for pick-up of surplus items as well as redistribution

☑ Increase campus understanding of digital material and eBooks--increase eBooks offering to 1500 titles

Campus Planning Theme: Teaching and Learning  
Secondary Goals: Partnership  
Sub Unit: Barnes and Noble  
Time Frame: Throughout fall and spring semesters

Actions taken for 2009-2010:

New goal

Evidence of Progress for 2009-2010:

- Amount of titles on list and sold  
- Increased requests from faculty for ebooks  
- Added marketing opportunities to present message about ebooks

Activities planned for 2010-2011:

- Partner with Nookstudy and B&N.com to provide a list of titles that were offered as ebooks for IUPUI courses  
- Increase marketing (in-store and during buyback in particular, campus events and website)  
- Provide shelf tags for ebooks  
- Make eBooks options available in course adoption system  
- Notify departments of eBooks options  
- Work with course pack providers to have digital codes available in store for students  
- Provide ebooks that are a rental-type option  
- Partner with UITS for support and marketing with ebooks

☑ Meet or exceed guest quality and service expectations in both retail and catering operations resulting in increased sales

Campus Planning Theme: Best Practices  
Secondary Goals: Resources  
Sub Unit: Food Service  
Time Frame: On-going

Actions taken for 2009-2010:

New goal

Evidence of Progress for 2009-2010:

- Increased sales
Activities planned for 2010-2011:

- Provide updated employee training at each service level--outlet employees, cashiers, back-of-house
- Ensure catering supervisor present at all served events
- Provide catering customers with service surveys immediately following the event

☑️ Provide Regular Training to Departments related to Capital Asset Management

**Campus Planning Theme**: Best Practices
**Secondary Goals**: People
**Sub Unit**: Financial Services
**Time Frame**: FY 2010, FY 2011

Actions taken for 2009-2010:

Purchased six hand held scanners for department inventory can be done in a timely manner. Has a dedicated employee to locate and scan capital items

Evidence of Progress for 2009-2010:

All departments will locate inventory their capital equipment on a biannual basis with a scanner

Activities planned for 2010-2011:

Continue to work with departments to train how to keep FIS up to date with correct inventory information

☑️ 2. **Transparency** Promote two way communication and understanding of campus and university finances and other administrative policies and procedures. Develop policies and procedures that ensure compliance and safeguards university assets while eliminating obstacles to the maximum extent possible.

☑️ Create and maintain a new, updated website to communicate with print customers through social networking and marketing opportunities

**Campus Planning Theme**: Best Practices
**Secondary Goals**: Value
**Sub Unit**: IKON
**Time Frame**: December 2010

Actions taken for 2009-2010:

None

Evidence of Progress for 2009-2010:
Activities planned for 2010-2011:

Contract with 3rd party webmaster and design site that will allow staff to update marketing information to keep customers informed of discounted specials and other activities

Complete consistent process for enrollment deposits for IUPUI units

Campus Planning Theme: Best Practices
Secondary Goals: Value
Sub Unit: Student Account Services
Time Frame: FY 2011

Actions taken for 2009-2010:

New goal.

Evidence of Progress for 2009-2010:

All units with enrollment deposits will be handled consistently

Activities planned for 2010-2011:

- Work with schools who utilize an enrollment deposit to develop a consistent methodology
- Finalize documentation of the process and target implementation for fall 2010

Enhance reporting for Campus Administration and Responsibility Centers

Campus Planning Theme: Best Practices
Secondary Goals:
Sub Unit: Budget Office
Time Frame: FY 2011

Actions taken for 2009-2010:

None

Evidence of Progress for 2009-2010:

To be determined
Activities planned for 2010-2011:

- Determine criteria for reports that would enhance decision making for Campus Administration and Deans
- Design and implement reports
- Review IPEDS data to ensure accuracy in categories

☑ Support with work of the RPC

**Campus Planning Theme:** Best Practices

**Secondary Goals:** Value, Resources

**Sub Unit:** Budget Office

**Time Frame:** FY 2010, FY 2011

---

Actions taken for 2009-2010:

- Work with Resource Planning Committee to modify the distribution of assessments and state appropriation
- The committee has been meeting and identifying the drivers associated with the distribution of assessments based closely on usage of the service
- The office is working on a model to identify the data sources and create a template for use

---

Evidence of Progress for 2009-2010:

The new model is planned to be implemented for FY 2012 budget setting

---

Activities planned for 2010-2011:

The template will be finalized and the appropriate drivers identified for each activity in the support units. The office will work on modeling various scenarios discussed by the Resource Planning Committee

---

3. **People** Develop and implement strategies for making IUPUI an employer of choice within the city, state, nation, and world with an engaged, competent, and diverse workforce.

☑ Add quality infant and toddler care to our program; use this addition as a springboard to develop better marketing strategies to promote the Center as well as deepen partnerships with different schools on campus

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

**Secondary Goals:** Partnership, Resources

**Sub Unit:** Center for Young Children

**Time Frame:** Phase I by November 2010; Phase II by January 2011

---

Actions taken for 2009-2010:

- Interviews in process
- Rooms currently being prepared
- Licensing inspection scheduled

---
Evidence of Progress for 2009-2010:

- Infants/Toddlers physically present in the Center
- Press release

Activities planned for 2010-2011:

- Press release upon the opening of the first two rooms
- Marketing tools redone to reflect changes
- Contact other departments to investigate research project collaboration related to infant/toddler development and care
- Phase I (one infant room; one toddler room) by November 2010
- Phase II (one more infant room; one more toddler room) by January 2011

☑ Develop a caring, connected, competent staff

Campus Planning Theme: Best Practices
Secondary Goals: Value
Sub Unit: Campus Facility Services
Time Frame: On-going

Actions taken for 2009-2010:

- Reviewed hiring practices, merged former CFS guidelines/policies with those of Parking and Transportation Services
- Developed in-house training for new hires for IU/Fiscal/HR policies
- Identified all required OSHA safety training requirements

Evidence of Progress for 2009-2010:

Engaged, better trained employees

Activities planned for 2010-2011:

- Achieve 100% compliance with OSHA requirements
- Provide IU/Fiscal/HR policy training on a biannual basis to current employees,
- Develop training database for tracking training

☑ Develop strategies to maintain a diverse workforce

Campus Planning Theme: Campus Climate for Diversity, Collaboration
Secondary Goals: Partnership
Sub Unit: Human Resources
Time Frame: 2008-2010

Actions taken for 2009-2010:
HRA collaborated with the Office of Equal Opportunity to revise campus recruitment and screening processes to increase opportunities to expand the pool of candidates from under-represented populations.

Evidence of Progress for 2009-2010:

A review of applicant data should reveal an increase in candidate pools with under-represented populations.

Activities planned for 2010-2011:

- HRA will increase its presence and initiate collaboration with campus affinity councils (Black Faculty and Staff Council, LGBT Faculty Staff Council, Native American Faculty Staff Council, and Latino/a Faculty Staff Council), organizations for women, and the disabled.
- Broaden recruitment efforts to reach diversity markets for all racial groups, women and the disabled.
- Increase presence in the community with organizations which can serve as referral and recruitment sources for diverse applicants.
- Actively seek the use of exit interview data to measure retention efforts.

☑ Performance Management Process

Campus Planning Theme: Best Practices
Secondary Goals:
Sub Unit: Division of Finance and Administration
Time Frame: 2010-2011

Actions taken for 2009-2010:

Conducted a session with Chancellor and his direct reports.

Evidence of Progress for 2009-2010:

4 out of 7 have completed cascading the process through their entire organization.

Activities planned for 2010-2011:

Cascade the process down from the Chancellor’s Cabinet to their staffs.

☑ Rebuild and strengthen relationships between administration and staff, as well as administration and parents, in an effort to create a culture of collaboration and teamwork for the good of the children at the CYC.

Campus Planning Theme: Best Practices, Collaboration
Secondary Goals: Transparency
Sub Unit: Center for Young Children
Time Frame: December 2010

Actions taken for 2009-2010:
Actions taken for 2009-2010:

- Participation in the New Leader Transition process (led by HR)
- Stakeholder groups (lead teachers, assistant teachers, parents, and front office staff) have met with HR representatives and provided feedback related to how to move the center in a positive direction

Evidence of Progress for 2009-2010:

- Positive feedback in the form of administrator evaluations
- Plan of action derived from negative feedback

Activities planned for 2010-2011:

- Meeting with HR staff to formulate a response plan
- Meeting with HR representatives and Center administration to discuss feedback
- Respond to feedback by putting relevant suggestions into practice

Service with Distinction

Campus Planning Theme: Best Practices
Secondary Goals: Value
Sub Unit: Division of Finance and Administration
Time Frame: On-going

Actions taken for 2009-2010:

1. 447 campus constituents were interviewed through 60 individual focus groups and interviews with 31 academic and administrative leaders. The focus groups were comprised of students and staff.

2. As a result, definitions were generated. 8 service standards and related behaviors were identified, as well as 9 barriers.

3. Service with Distinction was approved by the Chancellor’s Cabinet as a campus initiative.

Evidence of Progress for 2009-2010:

It is too early to determine because each unit will develop their own measurement of improvement; however, having a waitlist of people ready to join for phase II of the rollout would be a good indication of progress for the overall initiative.

Activities planned for 2010-2011:

Phase one of the rollout is planned with 5 to 10 units across the campus

4. Environment Ensure the safety of students, employees and visitors. Ensure that the facilities and grounds are well maintained and safe such that they add to the attraction and retention of students and employees. Be environmentally responsible.
Centralize hazardous waste operations for IUPUI and the contractual entities of Indiana University, Methodist, Riley and Wishard Hospitals as well as the Clarian Pathology Laboratory Building into a single permitted hazardous waste facility located at 1830 W. 16th Street

**Campus Planning Theme:** Best Practices  
**Secondary Goals:** Partnerships  
**Sub Unit:** Environmental Health & Safety  
**Time Frame:** July 1, 2010 and ongoing

---

**Actions taken for 2009-2010:**

1. Transitioned campus hazardous waste operations from the Environmental Management Facility to two temporary locations on campus

2. Secured regulatory interpretation from the Indiana Department of Environmental Management as to whether the 16th Street property could be considered as contiguous to the main campus avoiding the need for federal permitting

3. Initiated discussions with Wishard and Clarian Health, Inc. regarding the possibility of consolidating hazardous waste operations from their current locations to the W. 16th Street property

4. Secured the services of an experienced environmental consultant to assist in the development and submission of a hazardous waste treatment, storage and disposal permit application to the United States Environmental Protection Agency

5. Began the design process of transforming the West 16th Street property into a facility capable of being permitted as hazardous waste facility

---

**Evidence of Progress for 2009-2010:**

Five critical action steps completed during FY 09-10. We will concentrate on the remaining 8 steps to centralize hazardous waste operations

---

**Activities planned for 2010-2011:**

1. Meet with and address design considerations of the City of Indianapolis well field protection staff relative to the W. 16th Street hazardous waste facility

2. Finalize a design for the W. 16th Street facility

3. Finalize and submit permit application to the United States Environmental Protection Agency. Provide follow-up in response to the EPA’s request for additional information as required. Participate in the public comment/public hearing portion of the permitting process

4. Oversee construction of the facility

5. Develop and implement standard procedures for the facility consistent with those required for a fully-permitted treatment, storage and disposal facility
6. Secure and train adequate staffing to operate the facility as a fully permitted hazardous waste treatment, storage and disposal facility

7. Transition services from current locations on campus as well contractual entities to the West 16th Street facility

8. Refine operations to ensure ongoing compliance

☑ Develop Crime Prevention training in conjunction with Crime Stoppers of Central Indiana and partner with them to develop model campus crime stoppers program

Campus Planning Theme: Collaboration
Secondary Goals: Partnerships, People
Sub Unit: Police
Time Frame: On-going

Actions taken for 2009-2010:

- Named a Crime Prevention/Community Relations Coordinator
- Spring Break Travel Safety poster we produced in conjunction with Central Indiana Crime Stoppers for Spring Break 2010

Evidence of Progress for 2009-2010:

Named a Crime Prevention/Community Relations Coordinator for the department. Coordinator has met with representatives from Crime Stoppers to discuss plan of action

Activities planned for 2010-2011:

1. Produce Spring Break Safety Posters with Crime Stoppers

2. Conduct planning sessions with Crime Stoppers Unit

3. Develop IUPUI Specific Crime Stoppers webpage, develop internship program in conjunction with SPEA and Crime Stoppers, redesign safety and security training with Crime Stoppers material and branding

☑ Develop Laboratory Safety Refresher training for all Faculty, Staff and Students. Create Hydrogen Safety, Air Reactive Safety and Nano-particle Safety online training modules with exam for Faculty, Staff and Students who are using these materials in IUPUI laboratories

Campus Planning Theme: Teaching and Learning
Secondary Goals: Value
Sub Unit: Environmental Health & Safety
Time Frame: FY 2010-2011

Actions taken for 2009-2010:

- Developed Online training for Faculty, Staff and Students who are required to take the Laboratory Safety Training but are unable to attend the classroom training session
Evidence of Progress for 2009-2010:

Over 150 personnel have taken this training since made available

Activities planned for 2010-2011:

Monitor training and send certificates to students who have passed via e-mail

☑️ Enhance and improve the Bicycle Patrol Program by adding full-time officers to the bike patrol. This will cut departmental expenses (gas, vehicles). Increase officer interaction with public

- **Campus Planning Theme:** Best Practices
- **Secondary Goals:** Value, People, Resources
- **Sub Unit:** Police
- **Time Frame:** 2010–2011

Actions taken for 2009-2010:

New goal

Evidence of Progress for 2009-2010:

Increased visible police presence which will result in the prevention of crime and increase customer service due to improved personal contact with the public

Activities planned for 2010-2011:

1. Conduct interview selection process for new bike patrol officers (Police, Security, Student officers)

2. Use IIIFC (Indiana Intelligence Fusion Center) grant monies to purchase new patrol bikes

3. Conduct a formal training program and certification for new bike officers

☑️ Enhance campus sustainability

- **Campus Planning Theme:** Best Practices, Collaboration
- **Secondary Goals:** Value, Resources
- **Sub Unit:** Campus Facility Services
- **Time Frame:** On-going

Actions taken for 2009-2010:
New goal

Evidence of Progress for 2009-2010:

Reduction of campus carbon footprint

Activities planned for 2010-2011:

Develop CFS Sustainability Committee, complete Qualified Energy Savings Plan analysis, and issue contracts

☑ Industrial Hygiene, Develop an Animal Allergen Exposure Program for Campus

Campus Planning Theme: Best Practices

Secondary Goals: Environment

Sub Unit: Environmental Health & Safety

Time Frame: July 1, 2010 and on-going

Actions taken for 2009-2010:

New goal

Evidence of Progress for 2009-2010:

Established evidence and creation of Committee

Activities planned for 2010-2011:

- Develop a committee representing departments on campus that will be affected by the program
- Develop a written program and assist departments in implementing the necessary engineering and administrative controls
- The program will also initiate the development of an Animal Care and Use Occupational Health and Safety Program (OHS)

☑ Long term approach to Parking and Transportation Services for IUPUI Campus

Campus Planning Theme: Best Practices, Collaboration

Secondary Goals: Value, People, Partnerships

Sub Unit: Campus Facility Services

Time Frame: On-going

Actions taken for 2009-2010:

- Devised and implemented plan to deal with the lost parking spaces associated with Wishard transaction
- Opened Gateway garage, participated in medical master planning in order to identify parking needs and resources
Evidence of Progress for 2009-2010:

Parking inventory and access to inventory satisfies customer demands

Activities planned for 2010-2011:

- Develop the plan to support the next phase of Wishard land transfer
- Implement automatic pay machines in garages
- Complete planning for the Sports Garage expansion and begin construction
- Finalize arrangements with NIFS and NCAA for use of the garage

☑ Prepare "Active Shooter" training in collaboration with campus units for students, faculty and staff

**Campus Planning Theme**: Best Practices, Collaboration  
**Secondary Goals**: People, Environment  
**Sub Unit**: Police  
**Time Frame**: On-going

Actions taken for 2009-2010:

- Purchased Patrol Rifles and new side arms for the uniformed officers  
- Conducted familiarization training for all officers with both types of weapons  
- Placed "shots fired" and active shooter video links on various University web pages for students, faculty and staff

Evidence of Progress for 2009-2010:

Purchase of weapons, placed "Active Shooter" videos on web pages, firearms instructors developed an interactive training program for students, faculty and staff

Activities planned for 2010-2011:

- Provide live, interactive training sessions with campus community in regards to "active shooter" incidents  
- Select and train officers on staff for response to "active shooter" incidents with patrol rifles  
- Collaborating with UEMC to provide training seminars on active shooters for IUPUI Incident Management Team and Policy group leading to table top exercise and functional exercise

☐ 5. Resources: Develop and implement strategies that result in maximization of financial resources for use at the IUPUI campus and within our division.

☐ Build additional relationships with City County Building Departments through Individual departmental communications as well as communications through Purchasing Management to result in turnkey mail services while enhancing bottom-line results

**Campus Planning Theme**:  
**Secondary Goals**: Relationships
Sub Unit: Mail Services  
Time Frame: On-going

Actions taken for 2009-2010:

Relationship Building

Evidence of Progress for 2009-2010:

Contract with Marion County Clerk’s Office

Activities planned for 2010-2011:

Acquire additional business with City/County Administration

☑ Cost Cutting and Conserve Resources through IT  
Campus Planning Theme: Best Practices  
Secondary Goals: Value  
Sub Unit: Tech Services  
Time Frame: On-going

Actions taken for 2009-2010:

New goal

Evidence of Progress for 2009-2010:

Standardization of processes and successful redeployment and use of surplus target equipment

Activities planned for 2010-2011:

1. Develop communication and policy focused campaign, and promote awareness

2. Create FIAD Policy to review IT equipment before it is placed in surplus

3. Partnering with Surplus to enforce policy

4. Partnering with Dell to have a standard Quote in EPIC for FIAD systems.

5. Review and develop policy statements for on-going attention to resource conservation

☑ Create web-based transaction application  
Campus Planning Theme: Best Practices
Secondary Goals: Value
Sub Unit: Campus Card Services
Time Frame: 2010-2011 Fiscal Year

Actions taken for 2009-2010:

Defined the need exists to create a cost-effective environment in which vendors can accept Jagtag for payment

Evidence of Progress for 2009-2010:

Cboord POS terminals have been eliminated and all vendors are processing Jagtag payments via the web application

Activities planned for 2010-2011:

Create the application and select a few vendors for testing

☑ Determine the Future of the Natatorium

Campus Planning Theme: Best Practices, Civic Engagement
Secondary Goals: Transparency, Resources, Partnership, Value
Sub Unit: Division of Finance and Administration
Time Frame: 2010-2011

Actions taken for 2009-2010:

1. Considered and explored several financial models

2. December 2009 Roger Schmerner revised endowment proposal & presented to CIB board

Evidence of Progress for 2009-2010:

Workable financial agreement or develop plans for repurposing the facility

Activities planned for 2010-2011:

1. RFS placed for IP movable Floor & Artificial Turf in stadium

2. Requested an update of the 1999 Engineering Study of the facility to be completed by November 1, 2010

3. Determine final feasibility for continuation of the operation of the Natatorium

4. With funding – projects are prioritized and programming is taken offsite to continue some revenue flow while projects are in progress. Partial closings will be necessary and closure of all three pools may be necessary at some points. Calendar customers will be notified in the event of a scheduled event needing to relocate or reschedule
5. Without funding – an assessment will be necessary to determine exactly how much life the venues have remaining and plan should be created to decommission the venues

☑ Develop and implement a financial plan that generates positive financial performance (Food Service)

**Campus Planning Theme:** Best Practices  
**Secondary Goals:** Technology, Value  
**Sub Unit:** Food Service  
**Time Frame:** On-going

---

**Actions taken for 2009-2010:**

1. Implemented specific cost control procedures and programs to include the "checkbook" purchasing control system

2. Performed a price cost analysis of all items offered – retail and catering – to verify products were priced correctly to achieve budgeted product costs

3. Implemented preventative maintenance program for mechanical and food service equipment

4. Developed special discount program for IUPUI alumni and family social events that are booked in the Campus Center through calendar 2011; put together a bridal package and exhibited at local bridal fair.

5. "Unbundled" most of the food packages allowing customers to pick and choose exactly what they wanted; reduced portion sizes; closed Mama Leone's pizza and developed own brand of flatbread pizza

---

**Evidence of Progress for 2009-2010:**

1. Budgeted product and labor costs are met each month

2. Sales increases experienced YTD and same month compared to last year

3. Profit returned to the university exceeds budget for FY11

---

**Activities planned for 2010-2011:**

1. Utilize the business development director for Aux. Services to develop the university market

2. Continue outreach to non-university groups through bridal fairs, partnering with University Place and follow-up on leads generated through catered events

3. Work with registered student organizations, staff and faculty to meet budgets while still providing an acceptable product/service whenever possible

4. Build on the success of the fall voluntary meal plan by monitoring how it's used, surveying participants and making changes that will provide value to the student

5. Change (renegotiate) current fee contract to a P&L contract that gives the university a fixed percentage of sales and
Develop and implement a financial plan that generates positive financial performance (Mail Services)

Campus Planning Theme: Best Practices
Secondary Goals:
Sub Unit: Mail Services
Time Frame:

Actions taken for 2009-2010:

1. When new buildings are constructed, within the design process, space for a mail room will be included, so that a centralized drop off and pick up of mail can occur

2. Mail staff will fulfill dual roles of sorting and delivery on a daily basis

3. Customer service training for staff was completed

4. Costs (staffing levels and direct costs) are monitored on a monthly basis

5. Enhance current website to give customer information on departmental pick up and drop off

Evidence of Progress for 2009-2010:

1. Submission of Clarian Mail Metering Contract and approval

2. New construction and buildings coming online have a centralized mail room in place

3. Website updated and completed

Activities planned for 2010-2011:

1. Continue to work with School of Medicine to ensure IUPUI mail is sorted thru IUPUI system, not Clarian

2. Work with Clarian to achieve an integrated Mail Solution for all of IUPUI’s campus

3. When new buildings are constructed, within the design process, space for a mail room will be included, so that a centralized drop off and pick up of mail can occur

4. Costs (staffing levels and direct costs) are monitored on a monthly basis

5. Enhance current website to give customer information on departmental pick up and drop off

Develop and implement a financial plan that generates positive financial performance (University Place)

Campus Planning Theme: Best Practices
Secondary Goals:
Sub Unit: University Place
Time Frame: On-going
Time Frame: On-going

Actions taken for 2009-2010:

1. Developed the "eat local" special offerings in both Chancellors and Our Den
2. Upgrade break stations with menus to lower food and labor costs
3. Hired a "corporate express" sales associate to specifically target corporate conferences with fewer than 25 rooms and approximately 40 people peak attendance
4. Implement declining balance worksheet to achieve budgeted (or lower) food and beverage costs

Evidence of Progress for 2009-2010:

1. Sales goals are met or exceeded
2. Product and labor costs are at budget or below
3. Budget profit margins are met or exceeded

Activities planned for 2010-2011:

1. Auxiliary Services business development director hired to research university and university-related conferences that could be scheduled at University Place
2. Adjust overnight rates to reflect market conditions and competition
3. Provide incentives to groups to book conferences — i.e., complimentary opening reception, reduced parking rates, additional a/v equipment
4. Maintain pace of market specific telephone blitzes to uncover potential business in current fiscal year as well as future years

Expand options Remote Computing/Home Office
Campus Planning Theme: Best Practices
Secondary Goals: Value, People
Sub Unit: Tech Services
Time Frame: 2009 and on-going

Actions taken for 2009-2010:

1. Provide better options for remote processing where appropriate for routine use, as well as providing alternative for managing emergencies
2. Upgrade to the latest version installation of MS Share Point 2010
Evidence of Progress for 2009-2010:

- Go To Assist in Place
- More resources are available via the web and introduction of CEV

Activities planned for 2010-2011:

None

Implement Convenience Fee for Bursar payments

Campus Planning Theme: Best Practices
Secondary Goals:
Sub Unit: Student Account Services
Time Frame: FY 2010, FY 2011

Actions taken for 2009-2010:

Effective August 2010 a convenience fee was implemented for students choosing to pay their bursar bill with a credit card. A detailed communication plan was developed to inform students of the change and implanted throughout the FY 2010 year

Evidence of Progress for 2009-2010:

The convenience fee was implemented effective August 1, 2010

Activities planned for 2010-2011:

Implement the convenience fee in August 2010 and respond to questions from students

Increase departments' access to and use of electronic payroll adjustment vouchers

Campus Planning Theme: Best Practices
Secondary Goals: Value
Sub Unit: Financial Services
Time Frame: FY 2010, FY 2011

Actions taken for 2009-2010:

Created work plan to eliminate paper payroll adjustment vouchers and scheduled special training for targeted audiences

Evidence of Progress for 2009-2010:
• Ninety percent of departments are using the electronic process currently
• All departments will utilize the electronic payroll adjustment voucher in FY 2011

Activities planned for 2010-2011:

• Continue to reach departments not utilizing the electronic process
• Fully implement the electronic voucher process in FY 2011

☐ Increase sales and profitability

Campus Planning Theme: Research, Scholarship and Creative Activity, Best Practices, Civic Engagement
Secondary Goals: Value
Sub Unit: Barnes and Noble
Time Frame: On-going

Actions taken for 2009-2010:

New goal

Evidence of Progress for 2009-2010:

Increase in year-over-year revenue in all categories

Activities planned for 2010-2011:

• Drive general merchandise sales to a 15% increase
• Increase buyback for used books by 10%
• Increase web sales by 25%
• Schedule additional in-store events to increase foot traffic

☑ Industrial Hygiene, Provide EHS Training Courses through ONCOURSE

Campus Planning Theme: Best Practices
Secondary Goals: Value
Sub Unit: Environmental Health & Safety
Time Frame: July 1, 2010 and on-going

Actions taken for 2009-2010:

• Fifteen courses were added to ONCOURSE
• There are currently 900 employees who are registered to take EHS courses

Evidence of Progress for 2009-2010:

• Fifteen courses were added to ONCOURSE
There are currently 900 employees who are registered to take EHS courses

**Activities planned for 2010-2011:**

Add additional training including: Personal Protective Equipment; Slips, Trips, and Falls; Hazard Communications, New Employee Orientation, Lockout/Tagout, Back Safety

**Pilot Project: Centralized Endpoint Virtualization**

**Campus Planning Theme:** Best Practices

**Secondary Goals:** Value

**Sub Unit:** Tech Services

**Time Frame:** 2010-2011

**Actions taken for 2009-2010:**

- Representation on CEV Committee
- Participated in vendor review and product features

**Evidence of Progress for 2009-2010:**

CEV is being tested in partnership with UITS [http://uits.iupui.edu/page/azor](http://uits.iupui.edu/page/azor) and has allowed reduction in resource consumption

**Activities planned for 2010-2011:**

- Work with UITS to introduce our division as an early adopter organization, and work through installation for the majority of our frontline users
- Determine how best to introduce CEV as a Disaster Recovery and Business Continuity tool

**Resource Planning Committee:** To develop a new model for campus assessment, appropriation distribution, and the Chancellor’s Reallocation Fund - to more closely align these processes with campus priorities and the Responsibility Center Management philosophy

**Campus Planning Theme:** Best Practices

**Secondary Goals:** Transparency, Partnership

**Sub Unit:** Division of Finance and Administration

**Time Frame:** 2010-2011

**Actions taken for 2009-2010:**

Performed thorough discussion and review of current drivers with the Resource Planning Committee

**Evidence of Progress for 2009-2010:**
Written recommendation to the Chancellor addressing each component

Activities planned for 2010-2011:

The Resource Planning Committee will formulate recommendations on all three components: Campus Assessment; Appropriation Distribution; and Chancellor Reallocation

☐ Streamline the payroll process within departments to gain efficiencies

Campus Planning Theme: Best Practices
Secondary Goals: Value
Sub Unit: Financial Services
Time Frame: FY 2010, FY 2011

Actions taken for 2009-2010:

Participated in IU system wide work group which discussed ways to minimize redundancy in payroll functions and tasks performed at the department level

Evidence of Progress for 2009-2010:

Reduce or eliminate payroll activities in smaller departments

Activities planned for 2010-2011:

- Continue to assess the payroll function within large schools and departments to see where efficiencies can be gained
- Participate in University-wide benchmarking project on HR/Payroll

6. Partnerships Develop and maintain partnerships fundamental to the campus mission and advocate for campus priorities.

☐ Collaborate with the TCEM program and enhance the students' education by developing class projects with actual hands-on experience at University Place

Campus Planning Theme: Teaching and Learning
Secondary Goals:
Sub Unit: University Place
Time Frame: Both fall and spring semesters

Actions taken for 2009-2010:

Research by a TCEM intern during spring (‘10) semester resulted in uncovering faculty membership (five schools) in over 400 associations and societies

Evidence of Progress for 2009-2010:
Clear and complete list of associations with the appropriate contact information for University Place staff follow up

Activities planned for 2010-2011:

- TCEM convention sales class will continue research (both fall and spring semesters) for faculty association membership
- Follow through with the association website research and compile a list of association officers for University Place sales manager contact

✔ Develop a cook book using "Eat Local" recipes and donate all proceeds to support the IUPUI Community Garden

**Campus Planning Theme:** Civic Engagement  
**Secondary Goals:** Value  
**Sub Unit:** University Place  
**Time Frame:** October, 2010

Actions taken for 2009-2010:

None

Evidence of Progress for 2009-2010:

Initial printing (100 books) is sold out

Activities planned for 2010-2011:

- Compile recipes
- Design book
- Bid printing
- General promotion activities throughout the campus and specific promotions with the IUPUI Community Garden, Common Theme and Sustainability Committees

✔ Increase revenue by enhancing university relationships and exploring external connect points through faculty

**Campus Planning Theme:** Research, Scholarship and Creative Activity, Best Practices, Civic Engagement  
**Secondary Goals:** Value, Resources  
**Sub Unit:** University Place  
**Time Frame:** On-going

Actions taken for 2009-2010:

Presentations to various campus organizations

Evidence of Progress for 2009-2010:
Increase in university business and association business directly related academia

Activities planned for 2010-2011:

- Presentations to IUPUI Faculty Council, IUPUI schools (staff and faculty meetings), partnerships with various campus activities and events
- Presentations to IUB schools and departments
- Presentations to Purdue schools and departments

Integrating the other IU campuses into our JagTag card program infrastructure

Campus Planning Theme: Best Practices
Secondary Goals: Value, Resources
Sub Unit: Card Services
Time Frame: On-going

Actions taken for 2009-2010:

Began conversations with IU East

Evidence of Progress for 2009-2010:

IU SouthEast, East and Columbus have been successfully integrated with the Jagtag card program

Activities planned for 2010-2011:

- Integrate IU East
- Begin conversations with IU Kokomo

Mount an exhibit of the jurors' selections from NAMOS' "Commitment to Excellence in Art and Sport: A Fine Art Competition"

Campus Planning Theme: Teaching and Learning, Research, Scholarship and Creative Activity, Best Practices, Civic Engagement
Secondary Goals:
Sub Unit: NAMOS
Time Frame: April 2010 through April 2011

Actions taken for 2009-2010:

Committee organized, competition application and rules developed, contract made with Juried Art Services and IU Conferences, competition announced to artists, art schools and on art web sites, and early announcements on exhibit distributed
Evidence of Progress for 2009-2010:

- At this point 64 entries have been received from 19 states and three foreign countries
- Medals ordered, prize fund of $7,500 pledged
- Jurors enlisted and arrangement made for jurying, and announcements sent of exhibit
- Plans for exhibit reception initiated by NAMOS Board of Governors

Activities planned for 2010-2011:

Jury competition, hang selected art, honor award winners, publicize exhibit to the public, remove art and return to artists at end of exhibit

☑ Transition Fee Remission processing to departmental representatives

Campus Planning Theme: Best Practices
Secondary Goals: Value
Sub Unit: Student Account Services
Time Frame: FY 2011

Actions taken for 2009-2010:

A plan was developed for the retirement of the IUPUI-built fee remission website to allow for transition to departmental data entry into SIS

---

Evidence of Progress for 2009-2010:

Fee Remissions will be processed efficiently, accurately and timely by departments

Activities planned for 2010-2011:

Implement the plan including campus-wide training for departmental personnel and archiving historical fee remission data

☑ Wishard land swap coordination and managing the outcomes of this large transaction

Campus Planning Theme: Collaboration
Secondary Goals: Environment, Value
Sub Unit: Campus Facility Services
Time Frame: Now until 2013

Actions taken for 2009-2010:

- Developed a plan to vacate the Union building
- Relocated the functions and occupants of the Environmental Management Facility by June 1, 2010 for transfer to Wishard by October 1, 2010
- Evaluated the potential uses of Lockefield Village
Evidence of Progress for 2009-2010:

Effectively meet conditions of Wishard land swap for 2010-2011

Activities planned for 2010-2011:

- Secure space for and relocate the occupants of the Union building
- Facilitate transfer of the Lockefield Village building to the University
- Continue to participate in the evaluation of current Wishard structures for potential use by the University
- Participate in the evaluation of the early relocation of the Psychiatric Research building occupants

Fiscal Health

Reallocation Plan

Other Question(s)

1. Please describe faculty/staff participation in the planning process in your unit. What factors strongly influence your budget and planning priorities? Please give examples, which might include attracting and retaining undergraduates, strengthening graduate programs, building collaborative partnerships, increasing diversity in faculty and student populations.

Most of Finance and Administration planning efforts have focused on how we continue to provide services in the face of budget reductions. Across the division, the level of staff participation in these conversations varies. Some units extensively reach out to the rank and file for input and others less so. We have sought input on what services that should remain untouched. We discussed work that should be discontinued. In Campus Facility Services staff has participated in discussions of what should be considered base services and therefore covered by assessments versus what would require a fee for service.

The factors that most strongly affect our budget and planning priorities are protecting our ability to maintain a safe campus environment and being in compliance, whether with internal or external, regulations across the varied areas within Finance and Administration. Examples include: a) protecting the police budget from budget cuts the last two years. Additional FTE were actually added. B) Avoiding the reduction of staff in Environmental Health and Safety which would negatively impact research compliance.

2. How do the plans within your unit align with the President’s Principles of Excellence and the Chancellor’s Guideposts? Please describe your process for integrating your unit’s plans with those of the campus.

Finance and Administration will use the principles of excellence and the guidepost as the measuring stick for our actions. As we look internally at what we do we will ask ourselves how does our allocation of resources help uphold these principles and arrive at these guideposts. As we do our work as leaders on campus we will consistently focus our campus and university colleagues back to these two planning objectives in discussions about resource allocation, policy decisions, and procedures.

3. What longer-term trends (5-10 years) exist in your discipline/field that will affect your unit?

Cost containment, correctly so, continues to be a focus in Higher Education. Solutions for how to address costs have tended to have a cyclical impact on Finance and Administrations’ organizational structure across all of Higher Education in that we go back and forth between decentralized and centralized structures. Additionally, compliance requirements and related resources to ensure compliance we anticipate will continue to increase.

4. If the University experiences further budget cuts, what existing and emerging programs/initiatives in your unit will be your highest
The preference would be to continue to shelter police and environmental health and safety personnel. To do so would obviously come at a cost in other areas within Finance and Administration.