

Indiana University of PA

AF - Administration and Finance

Action: Diversity

Expand opportunities to recruit and retain a diverse workforce.

Assessment Year: 10-11

Start Date: 07/01/2010

End Date: 06/30/2011

Action Status: Active

Means of Assessment			
Assessment Method	Expected Outcome	Source of Data	Active
Work with the search committees to increase the count of diverse hires	Increase in diverse hiring.		Yes
Explore best practices across the system to enhance the diversity of our faculty, staff, and administrative populations.	Increase in diverse hiring.		Yes

Related Divisional Objectives

Strategic Plan (2007-2012)

* Academic Excellence - 1.D. Attract and Retain Highly Qualified, Diverse Faculty and Academic Support Staff

Action: Compliance Guidelines

Provide support to ensure compliance with guidelines and procedures.

Assessment Year: 10-11

Start Date: 07/01/2010

End Date: 06/30/2011

Action Status: Active

Means of Assessment			
Assessment Method	Expected Outcome	Source of Data	Active
Provide support for IUP Research Institute activities through the development of procedures and guidelines to ensure compliance, while increasing number of newly developed or updated compliance guidelines.	Increased projects funded; no audit findings.		Yes
Develop and implement efficient time and effort reporting mechanisms.	No audit findings related to time and effort reporting.		Yes

Related Divisional Objectives

Strategic Plan (2007-2012)

* Academic Excellence - 1.F. Increase Faculty Research and Scholarship in All its Forms

Action: Residential Revival

Provide leadership in operations of Student Residential Revival

Assessment Year: 10-11

Start Date: 07/10/2010

End Date: 06/30/2011

Action Status: Active

Means of Assessment

Means of Assessment			
Assessment Method	Expected Outcome	Source of Data	Active
Approval of Residential Revival Fees; accounting services; accurate student billings; maintenance of buildings and grounds; provide emergency services; waterfall calculations and transactions for Foundation for IUP.	Accurate recordings of revenue and expenses; accurate student billing; operational buildings.		Yes
IUP assumes ownership of Punxsutawney Residential Facility and secures short-term and tax exempt bond financing.	Pay off Citizens Bank Note; transfer of assets and liabilities; bridge and bond financing \$8.2M; building ownership reverts to IUP.		Yes

Related Divisional Objectives

Strategic Plan (2007-2012)

* Student Development and Success - 2.B. Promote Living-Learning Experiences for Students

Action: Dining/Catering Services

Secure dining/catering service contract; expand services to include KCAC needs.

Assessment Year: 10-11

Start Date: 07/01/2010

End Date: 06/30/2011

Action Status: Active

Means of Assessment			
Assessment Method	Expected Outcome	Source of Data	Active
Conduct RFP process; evaluate proposals, evaluate financial aspects.	Dining/catering contract		Yes

Action: Direct Lending

Develop and implement accounting standards for Direct Lending Program.

Assessment Year: 10-11

Start Date: 07/01/2010

End Date: 06/30/2011

Action Status: Active

Means of Assessment			
Assessment Method	Expected Outcome	Source of Data	Active
Daily reviews and monthly reconciliation of loan funds	Federal lending compliance		Yes

Action: Diversity Needs

Manage diversity needs university-wide

Assessment Year: 10-11

Start Date: 07/01/2010

End Date: 06/30/2011

Action Status: Active

Means of Assessment			
Assessment Method	Expected Outcome	Source of Data	Active

Means of Assessment			
Assessment Method	Expected Outcome	Source of Data	Active
Conduct the Second Annual Diversity Fair and increase the size of the event and diverse procurement in future years.	Diversity Fair held at IUP		Yes
Create a Supplier Diversity Council for IUP and have more community involvement in the development of diverse business opportunities within IUP.	First meeting held June 2010		Yes

Related Divisional Objectives

Strategic Plan (2007-2012)

* Civic Engagement - 3.C. Provide a Culture that Celebrates Differences and Values Diversity

Action: Communication

Support University Relations Communications plan through utilization of IUP Daily for all Administration and Finance related news items.

Assessment Year: 10-11

Start Date: 07/01/2010

End Date: 06/30/2011

Action Status: Active

Means of Assessment			
Assessment Method	Expected Outcome	Source of Data	Active
Number of Administration and Finance Communications utilizing IUP Daily	Increased communication		Yes

Related Divisional Objectives

Strategic Plan (2007-2012)

* Marketing and Promotion - 4.A. Elevate the Visibility of IUP Through Implementation of an Integrated Marketing Communications Plan

Action: KCAC - Marketing

Development of Cohesive Marketing Strategies for the Kovalchick Convention and Athletic Complex.

Assessment Year: 10-11

Start Date: 07/01/2010

End Date: 06/30/2011

Action Status: Active

Means of Assessment			
Assessment Method	Expected Outcome	Source of Data	Active
Creation of Marketing Plan	Approved and implemented plan		Yes
Design and approval of Web and Collateral Design and Distribution with independent identity.	Design and approval of Web and Collateral Design and Distribution		Yes

Related Divisional Objectives

Strategic Plan (2007-2012)

* Marketing and Promotion - 4.B. Brand IUP on the Local, National, and International Scale by Using the Brand Promise

Action: SWUFE Enrollment

Support SWUFE initiative through SWUFE enrollment, assessment of student fees, and communication of such transactions with college

Assessment Year: 10-11

Start Date: 07/01/2010

End Date: 06/30/2011

Action Status: Active

Means of Assessment			
Assessment Method	Expected Outcome	Source of Data	Active
Ensure accurate billing of SWUFE program participants	Accurate assessment for 49 incoming SWUFE international students		Yes

Related Divisional Objectives

Strategic Plan (2007-2012)

* Enrollment Management - 5.B. Engage All Members of the University Community to Strengthen Recruitment and Retention Efforts

Action: University Process

Provide Administration and Finance commitment to proactively improve university process.

Assessment Year: 10-11

Start Date: 07/01/2010

End Date: 06/30/2011

Action Status: Active

Means of Assessment			
Assessment Method	Expected Outcome	Source of Data	Active
Lead the University's workforce planning initiatives, work with each division to provide guidance in the development of proper separation procedures, proper leave payouts, reporting of results of incentive program, monitoring utilization of vacancies.	Employee retirements; personnel budget reductions	HR	Yes
Provide analysis and support of President and divisional Vice Presidents to evaluate and reallocate university financial resources within the General Fund Budget by having a balanced FY 11 budget; PASSHE BUDRPT submissions; Scenario analysis for FY 12	COT approval for FY 11; posting of FY11 budget; fall 2010 re-budget; spring 2011 re-budget; FY12 BUDRPT submissions; reduction targets set for FY 12, divisional reduction plans reviewed and approved.	Bud/Fin	Yes
Provide and deliver a success second annual Facilities Leadership Team Workshop	Workshop delivery	Fac	Yes
Install and implement the Preventive Maintenance Program to reduce the daily work requests and overall decrease maintenance costs.		Fac	Yes
Implement the facilities work plan to reduce personnel costs		Fac	Yes
Integrate Utility Services into the Facilities Management Department to realign the departments.		Fac/EC	Yes
A Facilities Project Storage Program was developed to track costs and receipts of materials through the SAP system and to take advantage of the Central Store Room project storage program. Project items are stored and delivered in a seamless		Proc/Stores	Yes

Means of Assessment			
Assessment Method	Expected Outcome	Source of Data	Active
manner.			
A Procurement Services and Central Stores website was created to provide campus customers and suppliers source of policies, procedures and current events within the departments and allow for the download of RFPs and RFPs by suppliers	Customer Service	Proc/Stores	Yes
The sale of certain surplus materials will generate more interest and revenues via the use of internet sales by listing them on Asset-Auction.com.	Increase Revenues	Proc/Store	Yes
More efficient operations within Procurement Services and Central Stores by developing Balanced Score cards; daily indicators of customer satisfaction and potential issues.	Efficiency	Proc/Store	Yes
More efficient operations through the elimination of mail lag, decreased paper requirements, and the elimination of postal and carrier costs by service contracts with suppliers are e-mailed rather than printed and mailed via snail mail or ground services.	Increased productivity.	Proc/Stores	Yes
Elimination of overtime costs associated with the annual physical inventory with the cycle counting implementation. Reduced inventory mistakes due to early intervention. Reduced inventory carrying costs associated with shrinkage and turnover.	Increased productivity; reduced overtime costs.	Proc/Stores	Yes
Fewer picking errors due to individual labels for each line item of an order and fewer mistakes associated with poor handwriting ability by implementing the process of issuing labels for each individual pick to place of the pick sheet.	Increased productivity	Proc/Stores	Yes
Time savings and continued quality service of the items was consistent when a Kanban system was implemented for small dollar items that are inventoried for Facilities Operations	Increased productivity	Proc/Stores	Yes
The new racks that were designed to allow a forklift to place and retrieve wood and drywall from the shelf with little manual intervention were installed. Time savings and reduced possibility of work related injury associated with the lifting and rotation of stock.	Increased productivity	Proc/Stores	Yes
Implemented the use of the Request for Quote (RFQ) system within SAP for the generation and evaluation of the RFQ which will result in more efficient RFQ operation that will eliminate duplicate efforts.	Employee Efficiency	Proc/Stores	Yes
RFP instructions were developed that explain the RFP process from beginning, through evaluation and debriefing and posted on the Procurement Services web-site thus enabling more complete and accurate RFPs which will result in measurable and accurate contractor duties.	Compliance	Proc/Stores	Yes
By eliminating end racks in Central Stores at the base of walls; Purchase rotary bins for small items it reduced stocking and picking time required; reduced time in issuing parts.	Increased productivity	Proc/Stores	Yes

Means of Assessment			
Assessment Method	Expected Outcome	Source of Data	Active
Implement a customer feedback forum on both the Procurement Services and Central Stores web-sites allowing campus customers to provide feedback that will enable better service to the customer.	Increased customer services	Proc/Stores	Yes
Implement an online vendor form to allow suppliers to provide profiles for bid lists. Request system integration through PASSHE of the information into the SAP system.	Procurement system integration	Proc/Stores	Yes
Perform analysis on outstanding student receivables and implement additional collection efforts and reduce of bad debt expense, implementation of credit reporting, secure services of collection agency for written-off accounts	Reduction of annual bad debt expense	Fin	Yes
Transition of purchasing card to new banking institution; increase minimum requisition level to \$500 also increase in number of purchasing card holders; reduction in requisition processing for orders less than \$500.	Increase number of purchasing cards issued, reduced number of low dollar requisitions	Fin/Proc	Yes
The final plan for the Long-Range Campus Facilities Master Plan will be presented to the IUP Council of Trustees in December, 2010. Upon approval of IUP Administration and council of Trustees, this plan and its programs will become the guide for all future facility planning for IUP.	COT endorsement of plan	AF-SDH	Yes
The final Signage Master Plan will be completed mid- 2011 and will be a guide to all signage on campus and an opinion of cost and phasing to implement.	COT endorsement of plan	AF-SDH	Yes
The completed construction of the Residential Revival program and a project of the Foundation for IUP under the supervision of IUP Administration and Finance have been completed for fall, 2010. This with full occupancy of all 3,548 beds. Giving IUP a complete new housing offer for its students and a positive impact to the campus landscape.	All four phases operational	AF-SDH	Yes

Related Divisional Objectives

Strategic Plan (2007-2012)

* Continuous Improvement - 6.A. Develop and Implement a Process to Realize University Mission and Goals

Action: Continuous Improvement

Support the Administration and Finance commitment to continuous improvement.

Assessment Year: 10-11

Start Date: 07/01/2010

End Date: 06/30/2011

Action Status: Active

Means of Assessment			
Assessment Method	Expected Outcome	Source of Data	Active
Increase review of internal controls and guidelines through internal audit activities by supporting internal audit work plan and orientation of new employee.	Annual audit plan; review of internal controls.	VP/Fin	Yes

Means of Assessment			
Assessment Method	Expected Outcome	Source of Data	Active
Coordinate the Flexible Spending Account Program Open Enrollment and employer FICA savings was seen of approximately \$22,937 based on employer FICA rate of 7.65%.	Increased employee participation	HR	Yes
Coordinate and advertise the H1N1 and seasonal flu vaccination programs with 710 employees received vaccinations.	Reduction of sick leave usage.	HR	Yes
Created kick-off campaign for the Wellness Program and coordinated campus wellness programs with Highmark Healthy U Program and participating results in lower health care costs for employees.	Lower health care costs	HR	Yes
Successfully implemented a working from home business practice for managers on an approved leave of absence and continuing of work production in the department while managers is on approved administrative leave.	Increased participation, employee morale	HR	Yes
Meet PASSHE expectations to implement paperless pay check.	Increased number of IUP Employees enrolled in PPSP	HR/FIN	Yes
There are Fall and Spring Procurement Conferences to share ideas, receive training, discuss techniques and philosophies, and receive continuous education hours toward recertification. Discuss current and proposed strategic sourcing contracts, gain knowledge through shared experiences and set strategies for the future.	Professional networking of staff	Proc/Stores	Yes
Achieve status of Certified Purchasing and Supply Management (CPSM) and the nomination of Member of the Charter Institute of Purchasing and Supply (MCIPS). Achieve CPSM and MCIPS certifications to provide accreditation of the Procurement Function at IUP.	Increased staff certifications	Proc/Stores	Yes
Maintain membership in the National Association of Educational Procurement, procurement agents will expand their knowledge and skill-sets in the profession and utilize to achieve further procurement opportunities for IUP.	Increases participation in professional organization	Proc/Stores	Yes
Attended seminars on current trends in Supply Chain Management, Certified Purchasing and Supply Management studies, and Microsoft Excel 7 and procurement agents will expand their knowledge and skill-sets in the profession and utilize to achieve further procurement opportunities for IUP.	Increased number of staff development experiences	Proc/Stores	Yes
Institute biweekly procurement and supply management training to staff which results in more knowledgeable and efficient staff.	Staff efficiency	Proc/Stores	Yes

Related Divisional Objectives

Strategic Plan (2007-2012)

* Continuous Improvement - 6.B. Engage the University Community in a Process of Continuous Improvement

Action: Corporate Training

Successful Operation of the Corporate Training and Executive Conference Center in the KCAC, lending itself easily to the programs aimed at corporate training and workforce development

Assessment Year: 10-11

Start Date: 07/01/2010

End Date: 06/30/2011

Action Status: Active

Means of Assessment			
Assessment Method	Expected Outcome	Source of Data	Active
Success in booking meetings and conferences with a continuing education and training component	Increased number of bookings	AVP	Yes

Related Divisional Objectives

Strategic Plan (2007-2012)

* Resource Development - 7.A. Strengthen the Financial Resource Base of the University through Increases in Research Grants, Annual Giving, Endowment, Major Gifts, Outreach to Alumni, and Advocacy to Policy Makers

Action: Undergraduate and Graduate ESF Allocations

Split annual Instructional fee increases 50/50 between ESF and Facilities until a 35/65 split is met. Starting in FY 08/09, an additional increase was approved by the COT for Masters (15%) and Doctoral (20%) in the ESF fee, resulting in more instructional (ESF) revenue for Graduate students.

Assessment Year: 10-11

Start Date: 07/01/2010

End Date: 06/30/2011

Action Status: Active

Means of Assessment			
Assessment Method	Expected Outcome	Source of Data	Active
The resulting split of ESF to facilities for FY 10/11 is 32.5/67.5 based on a 4.5% tuition increase.	Increased ESF allocations	Bud	Yes

Related Divisional Objectives

Strategic Plan (2007-2012)

* Resource Development - 7.B. Strategically Leverage Optimal Availability of Resources for Scholarships, Programs, Services, and Facilities

Action: University Mission

Provide leadership in the areas of facilities related to the university mission.

Assessment Year: 10-11

Start Date: 07/01/2010

End Date: 06/30/2011

Action Status: Active

Means of Assessment			
Assessment Method	Expected Outcome	Source of Data	Active
Complete the construction and technology installation of the KCAC. The KCAC will be recognized as a regional leader in meeting and event related technology and service, benefitting Campus and Community stakeholders	Successful utilization rates of KCAC conference space; increased conference bookings and revenues	AVP	Yes
Maintain square footage estimates for all campus buildings by E&G, Auxiliary, HUB & FIUP. Make adjustments for the demolition of buildings & renovation of buildings on campus, as well as adjustments for Residential Revival and new structures. Calculate new usage factors and ensure proper billing of all costs by user groups.	Proper assessment of user utility costs	Bud	Yes

Means of Assessment			
Assessment Method	Expected Outcome	Source of Data	Active
Monitor Siemens' projected savings to ensure a reduction in energy use. Convert the debt payment into a utility commodity rate in order to bill the cost of the debt payment through the Cogen utility billing formula. The savings target will be met and the debt payment will be paid from the Cogen budget.	Energy cost reduction	Bud	Yes
Develop and modify the FY 09/10 Penn State Utility report for IUP. Calculate IUP's fuel consumption, energy costs, energy consumption, unit fuel costs and unit energy costs. A report that compares all State System schools energy consumption by square footage and utility costs.	Report submission	Bud	Yes

Related Divisional Objectives

Strategic Plan (2007-2012)

* Resource Development - 7.C. Provide Facilities and Technology Commensurate with Academic Mission

Action: University Resources

Provide leadership in managing university resources efficiently.

Assessment Year: 10-11

Start Date: 07/01/2010

End Date: 06/30/2011

Action Status: Active

Means of Assessment			
Assessment Method	Expected Outcome	Source of Data	Active
Complete the implementation and management of the University Capital Budget process	Release of project funding	Fac	Yes
Complete the design for the Keith and Leonard project with successful opening of the facility on time and under budget.	Project completion	Fac	Yes
Initiate the pre-design for Weyandt and Walsh Hall replacement project with successful opening of the facility on time and under budget.	Project completion	Fac	Yes
Created facilities planning document that will guide university decisions to meet the needs for campus facilities, technology and equipment and guide budgeting for these needs.	COT endorsement of master plan SHD		Yes
Support all aspects of final construction for Phase 4 FIUP Residential Revival which will encourage new and remaining students to come to IUP. Will help to increase enrollment.	Increased enrollment	SHD	Yes
Conduct request for proposal process for local depository banking services with successful award of contract to banking institution.	Award of contract by March 1, 2011	Fin	Yes
Provide monthly reports of budget versus actual for UE Student Employment and Federal Work Study by Division by Fund Center. With the reports in place, each Division is responsible to cover any overage in UE Student Employment and Federal Work Study. The General fund no longer cover any overages in spending.	Proper allocation and spending of FWS	Bud	Yes

Strategic Plan (2007-2012)

* Resource Development - 7.D. Manage Resources Effectively and Efficiently to Accomplish the University Mission and Strategic Plan

Action: University Budget Advisory Committee

University-wide committee to provide recommendation on allocation of resources

Assessment Year: 10-11

Start Date: 07/01/2010

End Date: 06/30/2011

Action Status: Active

Means of Assessment			
Assessment Method	Expected Outcome	Source of Data	Active
The committee has started to provide ideas on reducing the budget deficit by making recommendations on cost reductions and revenue generation.	Regular UBAC meetings; revenue generation and/or expenditure reduction recommendations; broadcasting of financial reports; annual and mid-year budget documents	Bud/Fin	Yes

Related Divisional Objectives

Strategic Plan (2007-2012)

* Resource Development - 7.D. Manage Resources Effectively and Efficiently to Accomplish the University Mission and Strategic Plan

Action: Position Management System

Implemented a position control system on July 1, 2010 with the aid of Sungard

Assessment Year: 10-11

Start Date: 07/01/2010

End Date: 06/30/2011

Action Status: Active

Means of Assessment			
Assessment Method	Expected Outcome	Source of Data	Active
Accurate FTE employment status report, vacancy report and be able to show how changes in staffing affect the budget on a timely basis.	Accurate personnel cost estimates; position reporting capability	Bud/Fin/HR	Yes

Related Divisional Objectives

Strategic Plan (2007-2012)

* Resource Development - 7.D. Manage Resources Effectively and Efficiently to Accomplish the University Mission and Strategic Plan

Action: Performance Funding Allocation

Prioritize and allocate FY 10/11 Performance Funding based on Division needs and justifications received from each VP. The list is narrowed down to get the needs with in the performance funding allocation amount received from PASSHE. Once the VP's were in agreement, the list was sent and approved by the President.

Assessment Year: 10-11

Start Date: 07/01/2010

End Date: 06/30/2011

Action Status: Active

Means of Assessment			
Assessment Method	Expected Outcome	Source of Data	Active
Performance funding was spent on the approved items that received an allocation based on the priority list that was approved by the President.	Allocation of funding to efforts in line with strategic plan	Bud	Yes

Means of Assessment			
Assessment Method	Expected Outcome	Source of Data	Active

Related Divisional Objectives

Strategic Plan (2007-2012)

* Resource Development - 7.D. Manage Resources Effectively and Efficiently to Accomplish the University Mission and Strategic Plan

Action: Electricity and Natural Gas RFP's

Completed an economic analysis and cost evaluation for the electricity and natural gas RFP Bids

Assessment Year: 10-11

Start Date: 07/01/2010

End Date: 06/30/2011

Action Status: Active

Means of Assessment			
Assessment Method	Expected Outcome	Source of Data	Active
The university will receive the lowest price for both commodities (electricity and natural gas) and most dependable service from the winners of the bidding process.	Lowest Prices	Bud/Fac	Yes

Related Divisional Objectives

Strategic Plan (2007-2012)

* Resource Development - 7.D. Manage Resources Effectively and Efficiently to Accomplish the University Mission and Strategic Plan

Action: Long-Range Campus Facilities Master Plan

Developed a planning program to help in prioritizing facility needs in a schedule for implementation

Assessment Year: 10-11

Start Date: 07/01/2010

End Date: 06/30/2011

Action Status: Active

Means of Assessment			
Assessment Method	Expected Outcome	Source of Data	Active
Will be used as a guide to establish capital budget and university capital campaign facility projects.	Evaluation of funded deferred maintenance projects	SHD	Yes

Related Divisional Objectives

Strategic Plan (2007-2012)

* Resource Development - 7.D. Manage Resources Effectively and Efficiently to Accomplish the University Mission and Strategic Plan

Action: Optimize ICETEC Services

Ensure efficient operation of cogeneration facility and maximize revenue generation

Assessment Year: 10-11

Start Date: 07/01/2010

End Date: 06/30/2011

Action Status: Active

Means of Assessment			
Assessment Method	Expected Outcome	Source of Data	Active
IUP's performance as electricity "Generator"; optimal electrical sales and revenue generation	Listing as Generator for PJM; volume of sales and revenue	FAC/Bud	Yes

Strategic Plan (2007-2012)

* Resource Development - 7.D. Manage Resources Effectively and Efficiently to Accomplish the University Mission and Strategic Plan

Action: Safety Training

Provide leadership in safety training.

Assessment Year: 10-11

Start Date: 07/01/2010

End Date: 06/30/2011

Action Status: Active

Means of Assessment			
Assessment Method	Expected Outcome	Source of Data	Active
Provide training opportunity for Top Level Managers and Crisis Response Team with a simulated scenario to familiarize them with National Incident Management and provide familiarization with Incident management and how personnel and departments interact.	Training Certifications and increased level of knowledge	UP	Yes
Install and testing of emergency notification systems and effective emergency alert systems	Renegotiation of messaging agreements; implementation of university-wide speaker system	UP	Yes
Provide a safe and secure campus for students and employees; respond timely and professional to all calls and incident reports and provide statistical data on number of type and number of responses	Reduced number of reportable offenses and citations	UP	Yes

Related Divisional Objectives

Strategic Plan (2007-2012)

- * University Safety and Security - 8.A. Enhance and Strengthen a Safe, Secure, and Healthy Environment for Members of the University Community
- * University Safety and Security - 8.B. Enhance Security of the Physical and Informational Assets of the University