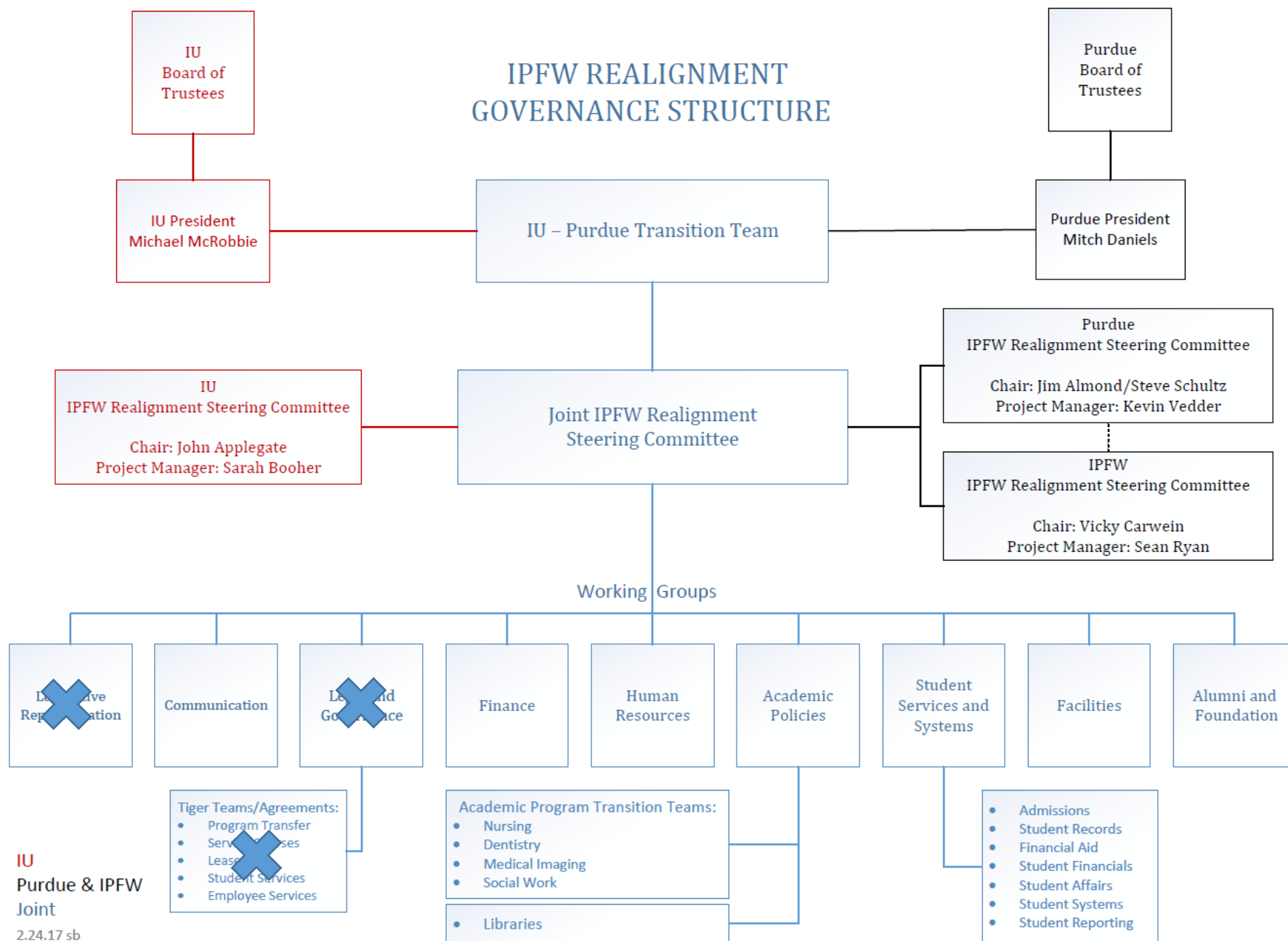


IPFW REALIGNMENT

Project Outline

Governance, Timeline & Teams
Implementation Phase





IPFW REALIGNMENT ORGANIZATION/GOVERNANCE

Intercampus Leadership Teams

Committee/ Working Group	Relevant Agreement Text	Membership			Agreement/ Deliverables
		IU	Purdue	IPFW	
IU-Purdue Transition Team – IU/PU <i>Inter-institutional leadership, guidance, alignment, coordination and oversight</i>	IV.B: “Commencing as of the Agreement Effective Date through the Realignment Effective Date, both Parties covenant and agree to establish and maintain a transition team comprised of representatives designated by their respective Presidents to assist with the implementation of funding and operational issues arising from the realignment and revised governance structure set forth in this Agreement and each ancillary agreement.”	<ul style="list-style-type: none"> •Simmons (chair) •Applegate •Sejdinaj •Booher (Project Manager) 	<ul style="list-style-type: none"> •Schultz (Co-chair) •Almond (Co-chair) •Klingerman •Ryan (Project Manager) 	<ul style="list-style-type: none"> •none 	Inter-institutional responsibility for re-alignment and associated activities including, but not limited to: <ul style="list-style-type: none"> •All required agreements and instruments •Operational planning and implementation •Approvals from IU and PU Presidents and BOTs
Joint IPFW Realignment Steering Committee (JIRSC) – IU/PU/IPFW <i>Realignment leadership, guidance, alignment, coordination and oversight</i>		<ul style="list-style-type: none"> •Applegate* •Adams •Hagen •Sample •Sejdinaj •Simmons •Smith-Simmons •Stephan •Booher 	<ul style="list-style-type: none"> •Schultz* •Almond* •Klingerman 	<ul style="list-style-type: none"> •Carwein* •Malanson •Wagner •Ryan 	<ul style="list-style-type: none"> •Project oversight and governance for all activities (agreements, instruments, operational plans, etc.) that are required and necessary in order to fulfill the stated objectives of the realignment agreement <p>Quarterly report review.</p>

Working Groups & Transition Teams

Committee/ Working Group	Relevant Agreement Text	Membership			Agreement/ Deliverables
		IU	Purdue	IPFW	
Academic Policies WG <i>Identification and resolution of impacts due to the realignment related to academic policies, procedures and guidelines</i>	III.A.3: Each university has obtained, or has received reasonable assurances that it will obtain, any and all accreditations, authorizations, consents and approvals from the Higher Learning Commission, and if applicable, the U.S. Department of Education, required as a result of this Agreement or the realignment of academic, research and public service mission areas and degrees to each University."	<ul style="list-style-type: none"> •Mc Kinney* (Chair) •Black, IUPUI HLC liaison •Ferguson 		<ul style="list-style-type: none"> •Drummond*^ •Johnson*^ (HLC) •Duncan •Hanke •Obergfell •Schwab 	<ul style="list-style-type: none"> •Implementation of: <ul style="list-style-type: none"> -Academic Services Agreement •Implementation of transition specific requirements for: <ul style="list-style-type: none"> -Academic policies -Curriculum -General education -Accreditation -Promotion and tenure -Advising -Teach out
Nursing Transition Team	II.A.3: "IU shall be designated and offer the following health science and medical education, academic, research and public service mission areas and degrees at the Fort Wayne campus: (i) Nursing, (ii) Dental Education, (iii) Radiography, and (vi) such other health science programs as IU determines in the future are appropriate (collectively, the "Indiana Academic Missions")." II.B.4: "IU will acquire and have responsibility for the assets (other than real property) of the nursing school, dental education program and radiography program administered at the Fort Wayne Campus."	<ul style="list-style-type: none"> •Newhouse* (Chair) •Buelow •Friesth •Fulton •Gannon •Griffin •Hacker •Hendricks •Krause •McDaniel •Pahl •Parker •Poskon •Townsend •Von Ah •Wagnes •Weiss 		<ul style="list-style-type: none"> •Sternberger*^ •Farris 	<ul style="list-style-type: none"> •Transition plan including all matters related to a successful transition of the Nursing program from IPFW to the IU School of Nursing.
Dentistry Transition Team	II.A.3: "IU shall be designated and offer the following health science and medical education, academic, research and public service mission areas and degrees at	<ul style="list-style-type: none"> •Williams* (Chair) •Brown •Capps •Ford 		<ul style="list-style-type: none"> •Obergfell*^ •Kracher •Pratt •Valliere 	<ul style="list-style-type: none"> •Transition plan including all matters related to a successful transition of the Dental Education

	<p>the Fort Wayne campus: (i) Nursing, (ii) Dental Education, (iii) Radiography, and (vi) such other health science programs as IU determines in the future are appropriate (collectively, the "Indiana Academic Missions")."</p> <p>II.B.4: "IU will acquire and have responsibility for the assets (other than real property) of the nursing school, dental education program and radiography program administered at the Fort Wayne Campus."</p>	<ul style="list-style-type: none"> •Guba •Hoffman •Kowolik •Maxwell •Peterson •Smith 			<p>program from IPFW to the IU School of Dentistry.</p>
Medical Imaging Transition Team	<p>II.A.3: "IU shall be designated and offer the following health science and medical education, academic, research and public service mission areas and degrees at the Fort Wayne campus: (i) Nursing, (ii) Dental Education, (iii) Radiography, and (vi) such other health science programs as IU determines in the future are appropriate (collectively, the "Indiana Academic Missions")."</p> <p>II.B.4: "IU will acquire and have responsibility for the assets (other than real property) of the nursing school, dental education program and radiography program administered at the Fort Wayne Campus."</p>	<ul style="list-style-type: none"> •Reeser* (Chair) •Bonds •Long 		•Obergfell*	<ul style="list-style-type: none"> •Transition plan including all matters related to a successful transition of the Medical Imaging program from IPFW to the IU School of Medicine.

Libraries Transition Team		<ul style="list-style-type: none"> •Charbopnneau* (Chair) •Anspach •Bailey •Clendenning •Cohen •Duggan •Lent •Lewis •Rios •Stone 	•Richardson*	•Smith Macklin*^	<ul style="list-style-type: none"> •Transition plan including all matters related to a successful transition of library resources. -General -Access -Electronic resources -System migration
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Committee/ Working Group	Relevant Agreement Text	Membership			Agreement/ Deliverables
		IU	Purdue	IPFW	
Communication WG <i>Communications and messaging to assist with change management to support awareness and understanding by stakeholders and constituents</i>	<p>IV.A: "The Parties shall mutually agree upon all press release announcements, press conferences and similar public statements of the realignment, this Agreement and related issues pertaining to the governance and realignment of IPFW and shall mutually agree as to the timing of the release of any such announcements. Notwithstanding the above, each University acknowledges that each University is subject to Indiana's Open Door Law and Access to Public Records Act. Concurrently with the Realignment Effective Date, IU and Purdue shall jointly execute a letter in a form agreed upon by both Universities, which will be sent by Purdue to all lenders, landlords, employees, independent contractors and parties to any existing written contracts, agreements or obligations to which IPFW is a party advising them of the realignment and change of governance structure for the Fort Wayne Campus."</p> <p>II.J.2: Notwithstanding Purdue's naming rights of the Fort Wayne Campus, IU shall have the exclusive authority and right to identify, name and designate its health sciences initiative, the Indiana Academic Missions, the IU School of Medicine – Fort Wayne and IU School of Social Work."</p>	<ul style="list-style-type: none"> •Smith-Simmons* •Flowers, IUSD •Krause, IUSN •Schneider, IUSW •Vonderheit, IUSM 	•Rosa*	<ul style="list-style-type: none"> •Wagner*^ •Fincannon •Hopkins^ 	<ul style="list-style-type: none"> •Near-term messaging •Advertising •Promotional materials •Marketing •Re-branding •Media & press releases across all mediums (social, print, online, etc.) •Naming •Web Site & Social Media
Finance WG <i>Development, coordination and implementation of</i>	<p>III.A.1: "Each university has determined, in its reasonable discretion, that adequate budget appropriations and funding has been approved by the Indiana General Assembly and including in the State of Indiana's 2017-2019 biennial budget for the purpose of compensating and funding the revenue changes, costs and expenses incurred by each University as a result of</p>	<ul style="list-style-type: none"> •Hagen* (Chair) •Broeker •Brown •Dimond •Griffin 	•Almond*	<ul style="list-style-type: none"> •Jackson*^ •Davich •Elick •Fincannon •Malanson^ 	<ul style="list-style-type: none"> •Identification of transition assets; review and update process (IU, PU, IPFD, IPFW) •Confirmation of plan realignment provisions and

<p><i>operational mechanisms, systems and resource needs to support the realignment</i></p>	<p>the realignment and revised governance structure contemplated by the Agreement as well as new programs and initiatives arising and developed from such realignment;"</p> <p>II.C.3: "The Program Transfer Agreement will include terms and conditions pertaining to student tuition and fees with the operating principle that each University sets and collects its own tuition and fees."</p>	<ul style="list-style-type: none"> •Keucher 		<ul style="list-style-type: none"> •Michalec •Soptelean •Wesse^ •Whitney 	<p>transfers (gen ed courses, leasing needs, support services, mandatory credit hours)</p> <ul style="list-style-type: none"> •Performance funding formula •Housing and bookstore coordination •Medical Education: continue or change current P.O. support services •IPFW Foundation review and recommendation •Assess impact to PU and IU endowments based on realignment (current and future) •Invoicing Tuition and Fee Receivables •Transitioned Staff Fee Remits •Business systems for IU programs
<p>Human Resources WG</p> <p><i>Identification and resolution of workforce specific impacts due to the realignment</i></p>	<p>II.D.1.a: "Except as otherwise provided in Section D.2 below, upon the Realignment Effective Date, IU agrees to offer employment to all full-time and part-time academic faculty (collectively, the "Purdue Transferred Faculty") of the Fort Wayne Campus employed by Purdue in accordance with Section 5 of the Management Agreement and working in an Indiana Academic Mission (as defined in this Agreement) as of June 30, 2017. IU agrees to offer, honor and provide substantially the same salary rate, rank, status, faculty appointment, academic rank designation, tenure probationary period credit and tenure of each Purdue Transferred Faculty as of the Realignment Effective Date. Benefits offered to the Purdue Transferred Faculty by IU will be substantially similar to the benefits received by the academic faculty of the Fort Wayne Campus employed by Purdue currently".</p> <p>II.D.1.b: "IU agrees to assume all rights and obligations of the appointment letter of each tenured Purdue Transferred Faculty in accordance with an appropriate Assignment and Assumption of Appointment Letter. IUPUI shall be the campus appointment for all Purdue Transferred Faculty."</p>	<ul style="list-style-type: none"> •Whelan* •Kliwer •Toliver, J. 	<ul style="list-style-type: none"> •Darrow* 	<ul style="list-style-type: none"> •Helmsing* •Downs •Jackson •Toliver, K. •Wesse •Obergfell •Smith^ 	<ul style="list-style-type: none"> •Assess impact and transition specific requirements for: <ul style="list-style-type: none"> -Purdue to IU faculty -18/20 faculty -Purdue to IU staff -Provide info on IU to Purdue staff and faculty (if applicable) •Identify mechanisms and procedures to address changes impacting the workforce including but not limited to: <ul style="list-style-type: none"> -Compensation, classification and Benefits

	<p>II.D.2: "All appointed academic faculty of the Fort Wayne Campus employed by IU and enrolled or otherwise eligible to participate in IU's 18/20 Retirement Plan of the Indiana Supplemental Early Retirement Plan shall remain employees of IU notwithstanding that any such faculty are assigned to a Purdue Academic Mission in accordance with this Agreement."</p> <p>II.D.3.b: "Purdue and IU agree to use their best efforts to enter into a Services Agreement, on terms and conditions mutually acceptable to each, with respect to the Faculty and Staff Services offered and provided by Purdue to faculty and staff serving in an Indiana Academic Mission."</p>				<ul style="list-style-type: none"> -HRIS integrations and crossovers -Pay frequency -Parking -Fee remissions -Student workers and Work study -Transfer of employee records -Promotion & Tenure -Facility access (rec center, athletic, theater tickets) -Health and wellness -Retirement vesting -Sick and vacation time for transitioning staff
<p>Student Services & Systems WG</p> <p><i>Development, coordination and implementation of operational mechanisms, systems and processes needed to support the realignment</i></p>	<p>II. C. 2: "Purdue and IU agree to use their best efforts to negotiate and enter into a Program Transfer Agreement to be effective as of July 1, 2017, containing definitive terms and conditions mutually acceptable to each, with respect to student services, including financial aid, and implications on performance funding prior to June 30, 2017, in a manner that allows students to have a seamless educational experience and for student credits to transfer between the Universities."</p> <p>II.C.4.a: "Each University shall be responsible to manage, maintain and document the academic transcripts and records of its students as required by each such University for the granting of its respective degrees."</p> <p>II.C.4.b: "Each University covenants and agrees to cooperate with the other and take steps necessary to permit the exchange of relevant student information between each University's respective information technology system in a timely and reliable manner to provide a convenient and accurate student, faculty and administrative experience for the exchange, access and delivery of rosters, transcripts and student records. "</p> <p>II.C.6.c: "Purdue and IU agree to use their best efforts to enter into a Services Agreement, containing definitive terms and conditions mutually acceptable to each, with respect to the Student Services offered and provided by Purdue to IU students. Consistent with Section I.B.2 above, the Parties have agreed to provide, subject to the terms of such Services Agreement, that Purdue will offer and deliver, and IU will procure and pay Purdue for, the</p>	<ul style="list-style-type: none"> •Kennedy* (Co-Chair) •Lowden* (Co-Chair) •Allaei •Bradshaw •Engler •Griffin •Harper •Hayes •Hendricks •Hubbard •Hunter •Johnston •Keucher •King •Lash •McDevitt •Moody •Myers •Schmitz •Smith •Spratt •Springston •Stephens •Sullivan 	<ul style="list-style-type: none"> •Beals* 	<ul style="list-style-type: none"> •Norman*^ •Calderon •Christmon^ •Davidson^ •Drummond •Hogan •Hurt •Jackson •Kever •Kimbrough •Litmer-Schwaller •Lunceford •Marcuccilli •McLaughlin •Michalec •Parnin •Price •Schrader •Sirk •Tipton •Vaughn •Wesse •Wilson 	<ul style="list-style-type: none"> •Implementation of: <ul style="list-style-type: none"> -Student/Staff Support Services Agreement -Academic Services Agreement •Assess impact and transition specific requirements for: <ul style="list-style-type: none"> -Registration -Student records -Financial aid/scholarships -Data and reporting -Admissions -Software licenses -Transfer to/from IU, IPFW -Recruiting -Orientation and Advsing -Tutoring -Clery Act -Title IX -Police

	Student Services for a period of time consistent with the term arrangements described in the last sentence of Section I.B.2 above."	<ul style="list-style-type: none"> •Tomlinson •Torstrick •Viers •Youngblood 			<ul style="list-style-type: none"> -Code of Conduct -Student Affairs (ODMA, accommodations, SAP, etc.) -Housing
Facilities WG <i>Identification and resolution of impacts due to the realignment related to facilities management</i>	<p>II. B. 2: "IU shall be the University with the full power, authority and responsibility to manage and operate the IU Medical School – Fort Wayne and medical building located on the Fort Wayne Campus (the "Medical Building") and any future buildings utilized for the Indiana Academic Missions, subject only to, in the case of the Medical Building, Purdue's ongoing provision of facility and administrative services under that certain 2008 Memorandum of Agreement between the parties, as amended and restated in accordance with Section B.3(b) below."</p> <p>II. B. 3. C: "Subject to the terms of the amended and restated 2008 Memorandum of Understanding and the Real Estate Lease Agreement (as defined below), each University shall have the full power, authority and responsibility to manage, operate and provide all necessary facility and administrative services required by such University's academic mission."</p>	<ul style="list-style-type: none"> •Banach* (Chair) •Dimond •Harper •Correll 		<ul style="list-style-type: none"> •Justice*^ •Davidson •Duncan •George •Wesse 	<ul style="list-style-type: none"> •Real estate and facilities management •Space utilization •Campus master plan •Real estate ownership
Alumni & Foundation WG <i>Engagement and outreach with alumni, friends of the University, donors, etc. to facilitate positive relationships and promote continued support before, during and after the realignment</i>	<p>II.7: "The applicability ancillary agreement will address alumni who obtained degrees and graduated from IPFW prior to the Realignment Effective Date and their membership in, as applicable, the alumni associations of IU, Purdue, or any alumni association maintained by Purdue for the Fort Wayne Campus."</p> <p>II.I: "The Universities agree to cooperate and use their best efforts to identify and honor donor intent with respect to existing endowments and gift agreements held by either University or the IPFW Endowment, with the understanding the funds, investments and gift agreements held by either University or the IPFW Endowment will, to the fullest extent practicable, be transferred to the respective University responsible for the academic mission associated with the donor's intent."</p>	<ul style="list-style-type: none"> •Forbes* •Decker •Riveire 	<ul style="list-style-type: none"> •Kapp •Amos 	<ul style="list-style-type: none"> •Dixon* •Fincannon*^ •Teagarden •Whitney •Sarjeant 	<ul style="list-style-type: none"> •Assess impact and necessary actions related to: <ul style="list-style-type: none"> -IPFW Foundation (ongoing support to) -Endowment transfers (coordinated with Legal) -commencement •Relationships •Communication

*Campus lead(s) ^PFW Transition Team