PURPOSE

LSU A&M utilizes a comprehensive, campus-wide process for planning, assessing, and measuring progress in meeting the goals established in the institution's strategic plan (strategicplan.lsu.edu). This process is critical in fulfilling the following requirements:

- documenting campus-wide efforts in support of the university’s mission;
- tracking progress to demonstrate achievement of the university’s goals as articulated in the university’s strategic plan;
- providing a systematic and integrated process for planning, assessment, and budgeting;
- establishing relevant information for making improvements and enhancing decision-making; and
- sustaining a solid framework for institutional effectiveness in alignment with regional accreditation (SACSCOC) standards.

ORGANIZATIONAL PLANNING STRUCTURE

Campus-wide planning requires that all areas of the university be engaged in the planning and assessment process. To coordinate planning and assessment, the campus is organized into academic units (colleges and academic departments) and support units (all other university divisions and offices). The process includes multiple layers of strategic planning with each unit’s plan aligned with the others and each unit contributing to the overall success in accomplishing the university’s strategic plan.

An organizational structure has been established to achieve a comprehensive, campus-wide planning and assessment strategy allowing the ability to track and to measure progress in meeting the goals outlined in the university’s strategic plan. Taskstream, the university’s system of record for institutional effectiveness, provides the tool to assist with tracking and monitoring progress. All divisions-colleges/academic departments and major reporting lines are expected to participate in the annual strategic planning and assessment process (see Appendix A for list of required planning units). Required planning units are based on the 2017-18 organizational structure; updates will be made, as needed, in response to reorganizations and other structural or reporting changes.

PROCESS

Strategic Plan

Each required planning unit shall develop a comprehensive strategic plan in alignment with the university’s strategic plan. In recognition that there is no universally accepted model for strategic planning and that various individuals and disciplines may have preferred methods, a template is not provided. Instead, each planning unit is asked to ensure its strategic plan includes, at a minimum, the following elements (albeit with the understanding that terminology may differ):

- **Mission**: What is the organizational unit’s purpose? What are the primary functions? Who are the primary stakeholders? How are the unit’s functions aligned with the university’s mission?
- **Goals**: Broad, unmeasurable statements about what the unit is trying to accomplish to meet its mission.
- **Objectives/Outcomes**: The measurable aspects of the unit's strategic plan. Objectives should be specific statements about the intended accomplishments or improvements identified in the
In general, the SMART acronym can be helpful in developing objectives: Specific, Measurable, Aggressive but Attainable, Results-oriented, and Time-bound.

- **Measures/Methods:** A measure is a metric or indicator that conveys progress made by the unit in achieving its goals and objectives (i.e. how will we know that we have accomplished our goal or objective?).

The strategic plan should be posted to the division/college/department website and uploaded in Taskstream in the format that best fits the needs of the unit.

**Annual Reporting [Required Elements]**
A continuous improvement cycle requires a systematic planning and assessment model, which includes a review and analysis of findings/results to help inform future processes and identify opportunities for improvement. Thus, all planning units are required to complete the following steps *annually* in Taskstream [Strategic Plan Workspace 2017- ]:

- **Strategic Plan.** Upload the unit’s comprehensive strategic plan.

- **Mission Statement.** Enter the unit’s mission/purpose statement as defined in the unit’s strategic plan. The mission statement should be reviewed periodically and revised as necessary.

- **Objectives/Outcomes.** Enter objectives/outcomes from the unit’s strategic plan for the given planning cycle. While a unit may have many objectives/outcomes, please enter 3 to 5 of the unit’s highest priority objectives. Each objective/outcome must align with the university’s strategic plan [map within Taskstream to LSU2025]. This mapping will assist the university in annually assessing and reporting overall progress in recognizing accomplishments campus-wide and achieving the goals set forth in the university’s strategic plan.

- **Measures.** Enter at least one measure for each identified priority objective/outcome. A measure is a metric or indicator that conveys progress made by the unit in achieving its goals and objectives (i.e. how will we know that we have accomplished our goal or objective? What evidence will you collect to help measure progress?). Examples of measures include: surveys or other formal feedback, data analysis, benchmarking, achievement of milestones, etc.

- **Targets.** Each measure requires the indication of a target. The target may be quantitative (e.g., 10% increase) or qualitative (e.g., successful completion) dependent upon the stated objective/outcome. Baseline data should be indicated, as appropriate.

- **Findings.** Enter a summary description of the findings/results for each measure providing necessary detail for interpretation and assessment. Discuss any trends or patterns, as applicable.

- **Use of Findings.** Enter a brief narrative focused on the discussion of the findings and how these findings are informing planning efforts or improvement initiatives. Questions for consideration may include: What actions have you taken to improve your unit’s programs or services based on evidence gathered from this assessment? Did the results yield the desired target—why or why not? What actions may need to happen to achieve the goal or for improvement? Are there ways to improve the assessment process?

- **Strategic Plan Annual Report (SPAR).** The strategic planning annual report is prepared and distributed to the faculty and staff for comments within the unit and submitted to the direct
supervisor (deans, vice presidents, or provost) for review and evaluation. This report shall be used for the annual performance evaluation process as well as a campus-wide demonstration of progress made in meeting the university's goals. The unit may determine the appropriate format of the report and upload it into Taskstream. However, the following elements must be included in sequential order:

I. **Accomplishments.** Highlights of noteworthy accomplishments, including applicable supporting data.

II. **Challenges.** Discussion of any identified challenges and steps taken (or planned) to address them. Major personnel changes should be documented.

III. **Program Review.** Departments that have recently undergone program review should address the recommendations from their approved action plans, including the status of each recommendation and steps for addressing any unmet recommendations.

IV. **Planning for Upcoming Year.** Please discuss: priorities for the upcoming year; resource allocations (or reallocations) to accomplish planned activities; priorities for fund raising (if applicable); and planned changes to the unit's strategic plan, if any, and rationale. If revised, the updated strategic plan should be posted in Taskstream in the "standing requirements" section and posted to the unit's website.

V. **Overall statement of the status or "well-being" of the unit.**

VI. **Other.** Each division/college/department may choose to include additional information to best meet their needs.

**Annual Reporting [Optional Elements]**

In recognition that planning styles differ, an optional “Action Plan” workspace is provided within Taskstream [Strategic Plan Workspace 2017-] to assist units in tracking strategies as related to objectives and/or to provide follow-up regarding objectives that have not been achieved. In basic terms, strategies outline the most significant steps and activities you plan to undertake that support the fulfillment of an objective. Strategies should not include routine, day-to-day operational activities. This space is provided purely for unit use, if so desired, and will not be included in reports developed by the Office of Institutional Effectiveness to assess progress of the university's strategic plan.

**TIMELINE/DUE DATES FOR 2017-18**

The following items should be completed in Taskstream [Strategic Plan Workspace 2017-] as follows:

- **Develop and/or revise strategic plan:** December 15, 2017
- **All Required Elements & Strategic Planning Annual Reports:** May 11, 2018

[Note: Divisions/Colleges should establish appropriate internal deadlines for departments to allow time for review and use of information in the annual reports so as to meet the May 11, 2018 deadline.]
RELATED RESOURCES

The “Quickstart Guide” for strategic planning is available to help navigate the process using Taskstream. The Guide, along with the other materials, is available in Taskstream under “shared resources.” To access Taskstream, login to myLSU and click the Taskstream icon on the left navigation panel as shown below:

To access the “Quickstart Guide,” click on “shared resources” in the top navigation (blue bar), enter “Strategic Plan” in the search as shown below and click the “search” button.

The following will appear, please click “Strategic Planning Resource Materials” to access:

<table>
<thead>
<tr>
<th>Title</th>
<th>Work Type</th>
<th>Published By</th>
<th>Published On</th>
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QUESTIONS

Please contact Sandi Gillilan, Associate Vice Provost for Institutional Effectiveness, at sgillilan@lsu.edu with any questions or requests for additional information.
APPENDIX A: REQUIRED REPORTING UNITS

Reporting to the President
Athletics
External Affairs
Institutional Advancement
Internal Audit
General Counsel
Strategic Communications

Reporting to the Executive Vice President & Provost
Colleges/Schools
  Academic Departments
Diversity
Graduate School
Honors College
Enrollment Management
Experience LSU
LSU Libraries
Office of Research & Economic Development
  Humanities/Social Sciences/Policy Issues/Research Integrity
  Science, Technology, Engineering, And Mathematics (STEM)
  Intellectual Property and Commercialization
  Office of Sponsored Programs
Senior Vice Provost
  Institutional Effectiveness
  LSU Press and The Southern Review
  Museum of Art
  Rural Life Museum and Windrush Gardens
Strategic Initiatives
Student Affairs
  Dean of Students
  Olinde Career Center
  Residential Life
  Student Health Center
  Student Success
  University Recreation
Vice Provost for Academic Programs & Support Services
  Academic Center for Student Athletes
  Cain Center for STEM Literacy
  Center for Community Engagement, Learning and Leadership
  Communication Across the Curriculum
  Continuing Education
  International Programs
  LSU Online
  Residential Colleges
  University College
  University Registrar

[continued]
Reporting to the Executive Vice President for Finance & Administration/CFO

Finance & Administration
  Accounting Services
  Budget and Planning
  Facility and Property Oversight
  Human Resource Management
  Information Technology Services
  Operations (Procurement/Property Management, Auxiliary Services)
  University Police

Notes:

1. Hierarchy based on the 2017-18 university organization structure.

2. Leadership for a given academic unit or support unit may choose to require additional units under their purview to develop strategic plans and/or to utilize Taskstream in their planning efforts. The additional units and users will be added to Taskstream upon request.

3. If questions, please contact Sandi Gillilan at sgillilan@lsu.edu.