PURPOSE

LSU 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 seeking 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 a comprehensive, participatory approach across academic, support, and administrative units - divisions, colleges, and departments. Required planning units (see Appendix A) are based on the 2018-19 organizational structure. Updates will be made, as needed, in response to reorganizations and other structural or reporting changes.

PROCESS: ANNUAL REPORTING REQUIREMENTS

LSU’s systematic planning and assessment process utilizes Taskstream by Watermark, the university’s system of record for institutional effectiveness, to complete the annual reporting requirements as outlined below.

Standing Requirements. The standing requirements section in Taskstream contains those items that change infrequently. Units should review and revise the following as needed:

- **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. The strategic plan should be uploaded in Taskstream and posted to the unit’s website.

- **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.

- **Priority Objectives/Outcomes (3 to 5):** While a unit may have many objectives/outcomes, please enter 3 to 5 of the unit's highest priority objectives/outcomes. Objectives/outcomes should be specific statements about the intended accomplishments or improvements identified in the strategic plan. 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.
**Annual Planning Cycle.** A planning cycle in Taskstream encompasses one year. Taskstream is updated each August to open the new workspace for the upcoming year. Prior year(s) information remains available.

- **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 objectives (i.e. How will we know that we have accomplished our 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 a checkpoint regarding status to date that is prepared and distributed to the faculty and staff for comments within the unit and submitted to the direct supervisor for review. This report shall be used in support of the annual faculty and staff 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. In addition, supervisors may choose to add requirements to meet their needs. However, at a minimum, the following elements must be included:

1. **Accomplishments.** Highlights of noteworthy accomplishments, including applicable supporting data, related to goals/objectives and other areas of interest.

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

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

4. **Planning for Upcoming Year.** 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 the strategic plan is revised, the updated strategic plan should be posted in Taskstream in the "standing requirements" section and posted to the unit's website.

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

6. **Other.** Each division/college/department may choose to include additional information to best meet their needs.
<table>
<thead>
<tr>
<th>Due Date</th>
<th>Responsible Unit</th>
<th>Activity</th>
<th>Expectations</th>
</tr>
</thead>
<tbody>
<tr>
<td>September 30, 2018</td>
<td>All Required Planning Units [Divisions, Colleges &amp; Departments]</td>
<td>Finalize the 2017-18 Planning Cycle</td>
<td>All reporting requirements should be completed in Taskstream for the 2017-18 planning cycle including all standing requirements (uploaded strategic plan, entered mission statement, indicated at least 3 to 5 priority objectives/outcomes) and all annual planning cycle elements (entered measures/targets and findings/use of findings for each priority objective/outcome). Review strategic plan, mission statement, priority objectives/outcomes, measures, and targets. Make necessary revisions in Taskstream for the 2018-19 planning cycle.</td>
</tr>
<tr>
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<td></td>
<td>Prepare for the 2018-19 Planning Cycle</td>
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| April 30, 2019         | Departments                                          | SPARs Due                                    | Departments upload the Strategic Planning Annual Reports (SPARs) in Taskstream for 2018-19 for review and inclusion in the Division/College report. Divisions/College may choose to establish earlier internal deadlines to meet their needs. Divisions/Colleges upload the Strategic Planning Annual Reports (SPARs) in Taskstream for 2018-19 for review.  
*Note: The SPARs shall be used in conjunction with faculty performance evaluations and the associated deadlines set forth in PS36.* |
<p>| May 30, 2019           | Divisions/Colleges                                   | SPARs Due                                    |                                                                                                                                                                                                              |
| September 30, 2019     | All Required Planning Units [Divisions, Colleges &amp; Departments] | Finalize the 2018-19 Planning Cycle          | All reporting requirements should be completed in Taskstream for the 2018-19 planning cycle including all standing requirements (uploaded strategic plan, entered mission statement, indicated at least 3 to 5 priority objectives/outcomes) and all annual planning cycle elements (entered measures/targets and findings/use of findings for each priority objective/outcome). Review strategic plan, mission statement, priority objectives/outcomes, measures, and targets. Make necessary revisions in Taskstream for the 2019-20 planning cycle. |
|                        |                                                      | Prepare for the 2019-20 Planning Cycle       |                                                                                                                                                                                                              |</p>
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<td>September 30, 2018</td>
<td>All Required Planning Units [Divisions &amp; Departments]</td>
<td>Finalize the 2017-18 Planning Cycle</td>
<td>All reporting requirements should be completed in Taskstream for the 2017-18 planning cycle including all standing requirements (uploaded strategic plan, entered mission statement, indicated at least 3 to 5 priority objectives/outcomes), all annual planning cycle elements (entered measures/targets and findings/use of findings for each priority objective/outcome) plus the SPAR.</td>
</tr>
<tr>
<td>May 30, 2019</td>
<td>Departments</td>
<td>SPARs Due</td>
<td>Departments upload the Strategic Planning Annual Reports (SPARs) in Taskstream for 2018-19 for review and inclusion in the Division report. Divisions may choose to establish earlier internal deadlines to meet their needs.</td>
</tr>
<tr>
<td>June 30, 2019</td>
<td>Divisions</td>
<td>SPARs Due</td>
<td>Divisions upload the Strategic Planning Annual Reports (SPARS) in Taskstream for 2018-19 for review.</td>
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<td>Note: The SPARs shall be used in conjunction with staff performance evaluations.</td>
</tr>
<tr>
<td>September 30, 2019</td>
<td>All Required Planning Units [Divisions &amp; Departments]</td>
<td>Finalize the 2018-19 Planning Cycle</td>
<td>All reporting requirements should be completed in Taskstream for the 2018-19 planning cycle including all standing requirements (uploaded strategic plan, entered mission statement, indicated at least 3 to 5 priority objectives/outcomes) and all annual planning cycle elements (entered measures/targets and findings/use of findings for each priority objective/outcome).</td>
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RELATED RESOURCES
The “Quickstart Guide” for strategic planning is available to help navigate the process in Taskstream. The Guide, along with the other materials, is available at www.lsu.edu/oie.

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 PLANNING UNITS

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

Reporting to Executive Vice President & Provost [Academic Affairs]
Colleges/Academic Departments
College of Agriculture
   Dept Agricultural & Extension Education & Evaluation
   Dept of Agricultural Economics & Agribusiness
   School of Animal Sciences
   Dept of Entomology
   Dept of Experimental Statistics
   School of Nutrition & Food Sciences
   School of Plant, Environmental & Soil Sciences
   Dept of Plant Pathology & Crop Physiology
   School of Renewable Natural Resources
   Dept of Textiles, Apparel Design & Merchandising
College of Art & Design
   School of Architecture
   School of Art
   School of Interior Design
   School of Landscape Architecture
E.J. Ourso College of Business
   Dept of Accounting
   Dept of Economics
   Dept of Finance
   Stephenson Dept of Entrepreneurship & Information Systems
   Rucks Dept of Management
   Dept of Marketing
   Public Administration Institute
College of the Coast & Environment
   Dept of Oceanography & Coastal Sciences
   Dept of Environmental Sciences
College of Engineering
   Dept of Biological & Agricultural Engineering
   Dept of Chemical Engineering
   Dept of Civil & Environmental Engineering
   Division of Computer Science
   Dept of Construction Management
   Division of Electrical & Computer Engineering
   Dept of Mechanical & Industrial Engineering
   Dept of Petroleum Engineering
College of Human Sciences & Education
   School of Education
   School of Kinesiology
   School of Leadership & Human Resource Development
   School of Library & Information Science
   School of Social Work

College of Humanities and Social Sciences
   Dept of Communication Sciences & Disorders
   Dept of Communication Studies
   Dept of English
   Dept of Foreign Languages & Literatures
   Dept of French Studies
   Dept of Geography & Anthropology
   Dept of History
   Dept of Philosophy & Religious Studies
   Dept of Political Science
   Dept of Psychology
   Dept of Sociology

Manship School of Mass Communication

College of Music and Dramatic Arts
   School of Music
   School of Theatre

College of Science
   Dept of Biological Sciences
   Dept of Chemistry
   Dept of Geology & Geophysics
   Dept of Mathematics
   Dept of Physics & Astronomy

School of Veterinary Medicine
   Dept of Comparative Biomedical Sciences
   Dept of Pathobiological Sciences
   Dept of Veterinary Clinical Sciences

LSU Paul M. Hebert Law Center
Roger Hadfield Ogden Honors College
Graduate School

Digital & Continuing Education [LSU Online]

Diversity
Enrollment Management
LSU Libraries

Office of Research & Economic Development
   Humanities/Social Sciences/Policy Issues/Research Integrity
   Science, Technology, Engineering, And Mathematics
   Intellectual Property and Commercialization
   Office of Sponsored Programs

Senior Vice Provost [Units Reporting To]
   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
   Student Health Center
   University Recreation
Vice Provost for Academic Programs & Support Services [Units Reporting To]
   Academic Center for Student Athletes
   Cain Center for STEM Literacy
   Center for Academic Success
   Center for Community Engagement, Learning and Leadership
   Communication Across the Curriculum
   International Programs
   LSU Discover
   Residential Colleges
   University College
   University Registrar

Reporting to the Executive Vice President & CFO [Finance & Administration]
Finance & Administration
   Accounting Services
   Auxiliary Services [Operations]
   Budget and Planning
   Facility and Property Oversight
   Human Resource Management
   Information Technology Services
   Procurement/Property Management [Operations]
   Residential Life [Operations]
   University Police

Notes:


2. Leadership for a given division or college 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, Associate Vice Provost, at sgillilan@lsu.edu.