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:

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

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 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.

IV. **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.

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.
## Academic Units [for listing of applicable units see Appendix - pp 6-7]

<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 [Colleges/Schools/Departments, Graduate School, Honors College, LSU Libraries]</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).</td>
</tr>
<tr>
<td>April 30, 2019</td>
<td>Academic Departments</td>
<td>SPARs Due</td>
<td>Upload the Strategic Planning Annual Reports (SPARs) in Taskstream for 2018-19 for review and inclusion in the College report.</td>
</tr>
<tr>
<td>May 30, 2019</td>
<td>Colleges, Graduate School, LSU Libraries</td>
<td>SPARs Due</td>
<td>Upload the Strategic Planning Annual Reports (SPARs) in Taskstream for 2018-19 for review.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Note: The SPARs shall be used in conjunction with faculty performance evaluations and the associated deadlines set forth in PS36.</td>
</tr>
<tr>
<td>September 30, 2019</td>
<td>All Required Planning Units [Colleges/Schools/Departments, Graduate School, Honors College, LSU Libraries]</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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<tr>
<td>September 30, 2018</td>
<td>All Required Planning Units [Divisions &amp; Departments – academic support, student support, administrative support]</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. Review strategic plan, mission statement, priority objectives/outcomes, measures, and targets. Make necessary revisions in Taskstream for the 2018-19 planning cycle.</td>
</tr>
</tbody>
</table>
| May 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 report.  

*Note: Divisions may choose to establish other internal deadlines to meet the overarching June 30th due date.*  

Divisions upload the Strategic Planning Annual Reports (SPARS) in Taskstream for 2018-19 for review.  

*Note: The SPARs shall be used in conjunction with staff performance evaluations.* |
| June 30, 2019    | Divisions                                              | SPARs Due                                                    | Divisions upload the Strategic Planning Annual Reports (SPARs) in Taskstream for 2018-19 for review.  

| September 30, 2019 | All Required Planning Units [Divisions & Departments – academic support, student support, administrative support] | 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. |
| May 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 report.  

*Note: Divisions may choose to establish other internal deadlines to meet the overarching June 30th due date.*  

Divisions upload the Strategic Planning Annual Reports (SPARS) in Taskstream for 2018-19 for review.  

*Note: The SPARs shall be used in conjunction with staff performance evaluations.* |
**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](http://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

Academic Units

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
Academic Units (continued)

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
LSU Libraries

Support [Academic Support, Student Support, Administrative Support]

Digital & Continuing Education [LSU Online]
Diversity
Enrollment Management
Finance & Administration
  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

General Counsel
Institutional Advancement
Internal Audit
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 Communications
Strategic Initiatives
Student Affairs
  Dean of Students
    Campus Life
    Disability Services
    Greek Life
    Military & Veterans Student Center
    Student Advocacy & Accountability
Parent & Family Programs
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

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.