



## Campus-wide Strategic Planning Guidelines 2018-19

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### 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](http://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.

**TIMELINE/DUE DATES: ACADEMIC AFFAIRS [page 3] + ADMINISTRATIVE [page 4]**

<b>Academic Affairs [Units reporting to the Executive Vice President &amp; Provost]</b>			
<b>Due Date</b>	<b>Responsible Unit</b>	<b>Activity</b>	<b>Expectations</b>
September 30, 2018	All Required Planning Units [Divisions, Colleges & Departments]	Finalize the 2017-18 Planning Cycle	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).
		Prepare for the 2018-19 Planning Cycle	Review strategic plan, mission statement, priority objectives/outcomes, measures, and targets. Make necessary revisions in Taskstream for the 2018-19 planning cycle.
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.
May 30, 2019	Divisions/Colleges	SPARs Due	Divisions/Colleges upload the Strategic Planning Annual Reports (SPARs) in Taskstream for 2018-19 for review.  <i>Note: The SPARs shall be used in conjunction with faculty performance evaluations and the associated deadlines set forth in PS36.</i>
September 30, 2019	All Required Planning Units [Divisions, Colleges & 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).
		Prepare for the 2019-20 Planning Cycle	Review strategic plan, mission statement, priority objectives/outcomes, measures, and targets. Make necessary revisions in Taskstream for the 2019-20 planning cycle.

<b>Administrative [Units reporting to the President or the Executive Vice President &amp; CFO]</b>			
<b>Due Date</b>	<b>Responsible Unit</b>	<b>Activity</b>	<b>Expectations</b>
September 30, 2018	All Required Planning Units [Divisions & Departments]	Finalize the 2017-18 Planning Cycle  Prepare for the 2018-19 Planning Cycle	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.
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. Divisions may choose to establish earlier internal deadlines to meet their needs.
June 30, 2019	Divisions	SPARs Due	Divisions upload the Strategic Planning Annual Reports (SPARs) in Taskstream for 2018-19 for review.  <i>Note: The SPARs shall be used in conjunction with staff performance evaluations.</i>
September 30, 2019	All Required Planning Units [Divisions & Departments]	Finalize the 2018-19 Planning Cycle  Prepare for the 2019-20 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.

### **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](mailto: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:

1. Hierarchy based on the 2018-19 university organization structure as of July 1, 2018.
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](mailto:sgillilan@lsu.edu).