

## Campus-Wide Strategic Planning Guidelines

### Institutional Effectiveness: Planning and Assessment Framework

In alignment with SACSCOC expectations, LSU demonstrates a commitment to the principles of continuous improvement, based on a systematic and documented process of assessing institutional performance with respect to mission across all aspects of the institution. The continuous improvement cycle includes the development of a plan, identification of expected outcomes and associated measures, assessment of the extent to which the outcome has been achieved, and evidence of seeking improvement based on analysis of the findings.

The following SACSCOC standards are addressed via the campus-wide strategic planning process:

SACSCOC Standard	Expectation	Required Participants
7.1	The institution engages in ongoing, comprehensive, and integrated research-based planning and evaluation processes that (a) focus on institutional quality and effectiveness and (b) incorporate a systematic review of institutional goals and outcomes consistent with its mission.	All Planning Units
7.3	The institution identifies expected outcomes of its administrative support services and demonstrates the extent to which the outcomes are achieved. <i>(Administrative/operational outcomes)</i>	All Planning Units
8.2.c	The institution identifies expected outcomes, assesses the extent to which it achieves these outcomes, and provides evidence of seeking improvement based on analysis of the results: c. Academic and student services that support student success. <i>(Student success outcomes, student learning outcomes)</i>	Units Reporting To: <ul style="list-style-type: none"> <li>• Academic Programs &amp; Student Support</li> <li>• Enrollment Management &amp; Student Success</li> <li>• Student Affairs</li> <li>• Others as applicable</li> </ul>

### Campus-Wide Strategic Planning

LSU employs 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 and assessment of expected outcomes;
- utilizing assessment findings to seek opportunities for improvement; and
- sustaining a solid systematic, continuous improvement framework in alignment with SACSCOC expectations (Standards 7.1, 7.3, 8.2.c).

LSU utilizes Taskstream AMS by Watermark as the system of record for institutional effectiveness requirements.

### **Organizational Structure: Planning Units**

Campus-wide planning requires a comprehensive, participatory approach across academic, support, and administrative units (e.g., divisions, colleges, departments, offices). A list of the units required to participate in the campus-wide planning process is available on the OIE website, which is updated annually to reflect any structural or reporting changes.

### **Annual Reporting Requirements**

The annual reporting requirements are documented via Taskstream AMS (*see Watermark via myLSU*):

- The **“Standing Requirements”** section includes those elements that change infrequently. Units should review and revise as needed. The required elements include: an uploaded current strategic plan, the unit's current mission statement, and at least three priority outcomes.
- The **“Annual Planning Cycle”** section provides a workspace to enter at least one assessment measure for each priority outcome plus related targets, findings, and use of findings for a given year. Taskstream AMS is updated each fall to open the new workspace for the current planning year.

### **Standing Requirements**

#### Strategic Plan

Each required planning unit must develop a comprehensive strategic plan in alignment with the university's strategic plan. In recognition that various individuals and disciplines may have a preferred method for strategic planning, a template is not provided. The strategic plan must be uploaded within Taskstream AMS.

#### Mission Statement

Enter the unit's mission statement as defined in the unit's strategic plan. This mission statement should concisely and clearly state the purpose of the unit, indicating primary functions and stakeholders. The mission statement should be reviewed periodically and revised as necessary.

#### Priority Outcomes

While a unit may pursue several objectives or outcomes each year, planning units are required to assess at least three priority outcomes annually within the Taskstream AMS workspace. Outcome statements should be specific, measurable, achievable, relevant, and time-bound. All

priority outcomes must be consistent with the unit’s mission and be in alignment with the university’s strategic plan [mapping within Taskstream AMS]. This mapping will assist the university in assessing overall progress in achieving the goals set forth in the university’s strategic plan.

The following defines types of outcomes and unit reporting expectations for each:

- Administrative/operational outcomes are specific statements about intended accomplishments or improvements in alignment with the unit’s strategic plan. Administrative/operational outcomes typically pertain to considerations such as efficiency, effectiveness, services provided (e.g., enhancement, increase), quality, compliance, or satisfaction/perception. [Applicable to all planning units (Standard 7.3). Academic support and student support units should clearly identify how the outcome is related to student success (see Standard 8.2.c – page 1)].
- Student success outcomes are clearly connected to the unit’s direct impact on student success. Example: Students utilizing “x” service will achieve higher levels of academic success (e.g., retention, GPA) than students not utilizing the service. [Applicable to academic support and student support units (see Standard 8.2.c – page 1)].
- Student learning outcomes provide direct evidence of student learning as provided by student programming, such as workshops or trainings, offered by the unit. Example: As a result of participating in “x,” students will report improved understanding of “x.” [Applicable to academic support and student support units (see Standard 8.2.c – page 1)].

#### Aligning Priority Outcomes to the University’s Strategic Plan

All priority outcomes must be in alignment with the University’s Strategic Plan. This is documented in Taskstream AMS via “mapping” each priority outcome to at least one of the university’s goals. Technical guidance is provided in the [Taskstream QuickStart Guide](#) (see OIE website).

### **Annual Planning Cycle**

#### Measures & Targets

**!! Required fields for this section within Taskstream AMS include: Measure Title and Target. Other fields are optional, as needed, to provide clarification.**

- **Measures.** At least one measure should be entered for each priority outcome; multiple measures per priority outcome are encouraged. A measure is a metric or indicator that conveys progress made in achieving the expected outcome (i.e., How will we know that we have accomplished what was intended). Examples: participation rates, surveys or other formal feedback, standardized reports, benchmarking, audit performance, compliance rates, etc.
- **Targets.** Each measure requires the indication of a target. A target is the desired level of performance that represents success in achieving the expected outcome. Examples: 90 percent satisfaction annually; 3 percent increase by 2025.

## Findings & Use of Findings

**!! Required fields for this section within Taskstream AMS include: Findings and Use of Findings.**

- **Findings.** Enter the findings (e.g., data, results) for each measure. Indicate if the target was achieved. Provide the necessary detail, including the actual findings plus any related information to facilitate interpretation and analysis (e.g., trend data, context). Briefly discuss.
- **Use of Findings.** Briefly discuss how the findings and analysis for each measure shall be used to inform future planning efforts and/or strategies for seeking opportunities for improvement related to the outcome. Specific examples should be provided. Questions for consideration include:
  - What actions will you take (or taken recently) to seek improvement of the unit's activities or services based on evidence gathered from this assessment process?
  - Did the results yield the desired achievement target – why or why not? Address any gaps in expectations and actual performance. What strategies will be employed in future years to meet the expected target?
  - Is the current assessment method appropriate to measure what is intended?

## Timelines/Due Dates

The annual reporting schedule is aligned with various institutional policies and requirements to (1) secure the necessary data for each measure and (2) provide an opportunity for participation and collaboration throughout the process.

Units are asked to complete all reporting requirements – standing and annual - for the prior planning cycle by no later than October 15<sup>th</sup> of each year. For example, units should finalize the 2023-24 planning cycle by October 15, 2024.

Units are strongly encouraged to enter findings and use of findings as soon as the pertinent information is available. The following timeline (see next page) is suggested to help facilitate the planning and assessment process.

### Suggested Timeline for Planning & Assessment

#### **Late Fall/Early Spring:**

- Ensure at least three priority outcomes and related measures + targets are entered into Taskstream for the given planning cycle. Revise, as needed, from the prior year.

#### **Summer/Early Fall:**

- Discuss the findings for each measure with the unit. Utilize feedback from the unit to determine how the findings shall be used for improvements and/or future planning efforts.
- Ensure findings and use of findings are entered into Taskstream AMS for all measures by October 15.
- Solidify plans for the next planning cycle, such as making any necessary changes to the unit's strategic plan, mission statement, priority outcomes, and/or related measures/targets. This allows sufficient time for review prior to the opening of the next annual planning cycle in Taskstream on November 1st.

### Taskstream AMS Access & Technical Assistance

A “Taskstream AMS QuickStart Guide” is available (<https://lsu.edu/oie/Planning/quickstart.pdf>) to help navigate the entry of required elements.

**!! NOTE: Taskstream AMS is accessible via the Watermark icon my LSU Quick Links.**



Only authorized users may access Taskstream AMS. Units should notify OIE ([oie@lsu.edu](mailto:oie@lsu.edu)) to request the addition of any users to the unit’s workspace as needed to facilitate the unit’s annual strategic planning reporting process.

### Questions

Contact Tara Rose via email at [trose@lsu.edu](mailto:trose@lsu.edu) or phone at 225-578-4915.

*This campus-wide strategic planning process was launched in fall 2017 in conjunction with the release of LSU2025, the campus strategic plan. The Guidelines were updated in 2018 to reflect SACSCOC revised standards.*