



Louisiana State University

Office of Academic Affairs

February 21, 1999

Daniel Fogel
From: Daniel Fogel, Executive Vice Chancellor and Provost
To: Members of the UPC
Subject: **Attached Memo on Planning to F&A Units**

As you know, VC Baudin asked me to put into writing the comments I gave him last fall on the planning documents from his units. My attempt to do so is attached. If you have additional comments on any of these units, please email them to me for forwarding to Jerry.

Please note also that because of the timetable and because we know we will not be able to absorb the March 15 submissions en masse by the end of March, I have extended the submission deadline for F&A units to April 5. I will be on leave 2/22 and 2/23 but will be checking email and hope to come back with a similar document directed to VC Jelinski and the units that report to her; therefore, if you have comments on unit plans within the division of Research and Graduate Studies, please email them to me at evcp@lsu.edu. We'll also extend the deadline to April 5 for Lynn's units. Thanks!

cc: VC Jelinski, Vice Provost Mathews



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Daniel Fogel
From: Daniel Fogel, Executive Vice Chancellor and Provost
To: Unit Heads in Finance & Administrative Services
Via: Vice Chancellor Jerry Baudin, Finance and Administrative Services
Subject: Comments on F&A Planning Documents

I. Introduction and General Comments

After I gave Dr. Baudin, last fall, a verbal summary of University Planning Council comments on F&A planning documents, he asked that I provide a written record of UPC responses to F&A unit plans. I am pleased to do so. **In order to give the units in F&A time to accommodate these comments into their revised planning documents, I am extending the deadline for response from F&A to the UPC to Monday, April 5.**

Everyone should bear in mind the following points in reading these comments:

- They are by and large comments on the plans as plans, not on the units themselves;
- The comments are not prescriptive¹;
- They are to some extent catch-all summaries of UPC discussions, with particular items in some cases capturing the comments of a single member of the UPC rather than expressing a consensus viewpoint.

A few additional general observations by way of introduction. First, it is important for all unit heads in F&A to have at hand as they work on their plans the general packet of

¹We are not asking for revisions that must be undertaken for the sake of, or at the command of, the UPC. They are for your benefit, for you and your colleagues to take or leave as you see fit. We are trying to assist in a process that is to a large extent its own reward in helping units to develop shared vision, refined and more sharply focused mission statements, and well-understood objectives underpinned by realistic time-bound action plans for pursuing those objectives and by useful measures for gauging progress;

instructions distributed in early December, 1998 (beginning with the Chancellor's cover memo of November 30 and my memo of December 3).

Second, to the fullest extent possible, plans should not be developed top-down within units but should entail multiple staff inputs and wide consultation. The value of planning lies in large measure in the process itself. Broad participation in that process is therefore highly desirable. Unit heads and participating personnel should ask themselves whether all salient problems, critical issues, and important challenges facing their units are expressed and adequately addressed in the plans. Let's not have any missing forests for all our trees.

Third, some units may find it necessary to trim their plans considerably to get down to objectives that lend themselves to the development of time-bound performance indicators. To give focus to activities within operational time-frames, units should be sure to highlight (per my December 3 memo) at most a few objectives on which significant measurable progress will be made in FY 1999-2000, identifying whenever possible particular personnel responsible for the pertinent activities.

The UPC—and Chancellor Jenkins and I—are sensitive to the cynicism and weariness that have characterized responses within the LSU community to past planning processes and, to some extent (at the very least as a residuum of past experiences), to the present process. Let me affirm to you and your colleagues as I have to every group with whom I have discussed our project that we are very serious about making planning at LSU on-going, highly constructive, and unquestionably rewarding.

To do so, we must ensure that planning is linked directly to real decision-making, effective action, and continuous improvement. I believe that my own effort in the planning arena is the single most important part of my work and would be for any provost who rightly understood the role of his/her position. I hope that colleagues in F & A will see their roles in planning in the same light, as urgent and mission critical.

Only through a commitment to a shared vision for LSU and to clear, coordinated programs for understanding where we are going and how we are going to get there can we advance significantly within the ranks of the nation's great public universities for the benefit of our students and of the citizens of Louisiana. We know that you and your colleagues share our commitment, that they are critical to its success, and that their dedication and professionalism will be expressed in the development of plans that will help us all to move forward. Thank you for the tremendous efforts all of you exert in this undertaking.

Specific Comments on F&A Plans (unit by unit per division submission)

Note: These comments have been kept intentionally brief. It is the presumption of the UPC that much of what must be done at the next stage of the planning process will be self-evident as units work through the formulation of specific, time-bound performance objectives while seeking to identify responsible parties within their organizations and to assess opportunities and constraints.