



Daniel M Fogel  
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To:  
cc: Mark A Emmert/emmert/LSU@LSU (bcc: Peggy S Miller/peggym/LSU)  
Subject: Announcement of Reporting Requirements

When I met late last spring with the deans and vice chancellors to discuss the planning documents developed in their colleges and divisions, we agreed that units would report in March of 2000 on progress in achieving the objectives identified in their plans. Performance updates will be due each year at the same time. At this stage in the evolution of planning at LSU, however, everyone should understand that plans are to be used regularly, including continuous monitoring of assessment measures, to set and adjust objectives and to improve performance.

Computing Services has now developed a Web-based performance update form. You can preview the form through a slide-show at <http://app1002.lsu.edu/pdemo.nsf>. The full interactive version will be available for use by February 18 only by designated personnel who will be issued ID's and passwords for entering a secured web-site to create, edit, and submit performance updates. Security will allow us to restrict viewing of performance updates to persons with whom unit heads share the passwords and to deans, vice chancellors, the University Planning Council, and Chancellor Emmert. (We have created electronic reporting in pursuit of objective 3.3 of the University Planning Document: To implement an electronic, automated workplace--many thanks are due to Computing Services!)

\*\* For each unit, we must have, no later than Wednesday, February 9, the name of the individual for whom the performance update ID and password should be issued. The name of your unit's performance update reporter (in most cases, this will be you as unit head or your unit's assessment coordinator) should be sent to Ed Braithwaite at [ebraith@lsu.edu](mailto:ebraith@lsu.edu) or call 8-1455.

\*\* In addition, please send Ed by the same deadline an email attachment or disc containing the current version of your plan (in WordPerfect, Word, or HTML but NOT as a PDF file). NOTE: THIS COPY SHOULD CONTAIN THE SAME TEXT AS THE VERSION OF YOUR PLAN CURRENTLY LINKED TO THE "UNIVERSITY PLANNING DOCUMENTS" PAGE OF THE LSU WEB-SITE. YOUR PERFORMANCE UPDATE SHOULD REFERENCE THE CURRENTLY POSTED VERSION AND NOT A LATER REVISION. ANY REVISIONS TO YOUR PLAN ARE TO BE POSTED AFTER SUBMISSION OF YOUR PERFORMANCE UPDATE AND NO LATER THAN JULY 1.

For each objective, you will be asked to fill out a form that is both historical and prospective. Historically, you will report: 1) whether measurable progress has been made (yes/no), 2) current status of the performance indicator for each objective, 3) the methodology used to calculate the performance indicator. Prospectively, you will record: 4) any revisions made or to be made in objectives or performance indicators on the basis of experience to date, 5) budgetary implications, if any, for the next two years, including any measures to be taken to increase productivity while reducing cost, and 6) general comments. In addition to reporting on each objective, you will be able to assess the success of the plan as a whole and to comment both on the overall progress of your unit and on the planning process itself.

The performance updates (and the plans themselves) have multiple uses:

1. First and foremost, they are to benefit the units by providing clarity and direction for improved performance.
2. Second, and very importantly, they provide information to decision-makers at all levels that will

be used in resource allocation and budget preparation.

3. Collaterally, they provide critical information for use in performance evaluations of units as a whole, of administrators at all levels, and of individual faculty and staff assigned responsibility for particular objectives and activities.

Any revisions to plans prompted by the annual reporting exercise must be published to the Web (and circulated or announced to faculty and staff in each unit) no later than July 1. Unit performance updates will be due March 15 except those from deans and vice chancellors, which will be due on March 30. Shortly thereafter (by mid-April, on dates to be announced), the deans, vice chancellors, and chancellor, along with the UPC, will have their second annual planning retreat, an occasion for intensive information exchange and for open discussion aimed at the ongoing development of the institution's strategic agenda.

Questions or comments may be addressed directly to me, to the UPC as a whole (at [UPC@lsu.edu](mailto:UPC@lsu.edu)), or to its individual members. A list of current members and their email addresses follows.

#### CURRENT MEMBERSHIP OF THE UNIVERSITY PLANNING COUNCIL

Richard Bengtson, Professor of Biological and Agricultural Engineering, [bengtson@gumbo.bae.lsu.edu](mailto:bengtson@gumbo.bae.lsu.edu)  
Daniel Fogel, Provost and Professor, chair of UPC, [evcp@lsu.edu](mailto:evcp@lsu.edu)  
Barbara Fuhrmann, Dean and Professor, [fuhrma@lsu.edu](mailto:fuhrma@lsu.edu)  
Blake Ives, Professor of Information Systems and Decision Sciences, [bives@lsu.edu](mailto:bives@lsu.edu) [on leave]  
L. Robert Kuhn, Jr., Associate Vice Chancellor, [rkuhn@lsu.edu](mailto:rkuhn@lsu.edu)  
Laura Lindsay, Professor of Mass Communication, [aclind@lsu.edu](mailto:aclind@lsu.edu)  
F. Neil Mathews, Vice Provost and Professor, [fmathe1@lsu.edu](mailto:fmathe1@lsu.edu)  
Ronald Ross, Dean and Professor, [ross@lsu.edu](mailto:ross@lsu.edu)  
Gregory Vincent, Vice Provost, [gvincen@lsu.edu](mailto:gvincen@lsu.edu)  
Robert Zwirn, Professor of Architecture, [ardir@unix1.sncc.lsu.edu](mailto:ardir@unix1.sncc.lsu.edu)  
Joel Tohline, Professor Physics & Astronomy, [tohline@rouge.phys.lsu.edu](mailto:tohline@rouge.phys.lsu.edu) [on leave]

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Daniel Mark Fogel  
Executive Vice Chancellor and Provost  
Louisiana State University and Agricultural & Mechanical College  
146 Thomas Boyd Hall  
Baton Rouge, Louisiana 70803  
Phone: 225-388-8863  
Fax: 225-388-5980  
Email: [evcp@lsu.edu](mailto:evcp@lsu.edu)