Bridging Strategy and Action: Operationalizing a Model for Institutional Planning and Impact

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SACCR 2025, Biloxi, MS September 9, 2025

Learning Outcomes

By the end of this session, participants will be able to:

- Apply a four-phase institutional planning model to support strategic alignment.
- Identify tools and templates that enhance transparency and close the loop.
- Evaluate strategies for simplifying planning language and fostering collaboration.

Framing Context Slide

- Strategic planning often feels **complex, siloed, and disconnected**.
- Institutions struggle to translate plans into **actionable steps**.
- Faculty and staff may see planning as a compliance exercise rather than a tool for improvement.
- Today's session will show how a **clear cycle + simple tools** can bridge strategy and action.

Why planning fails

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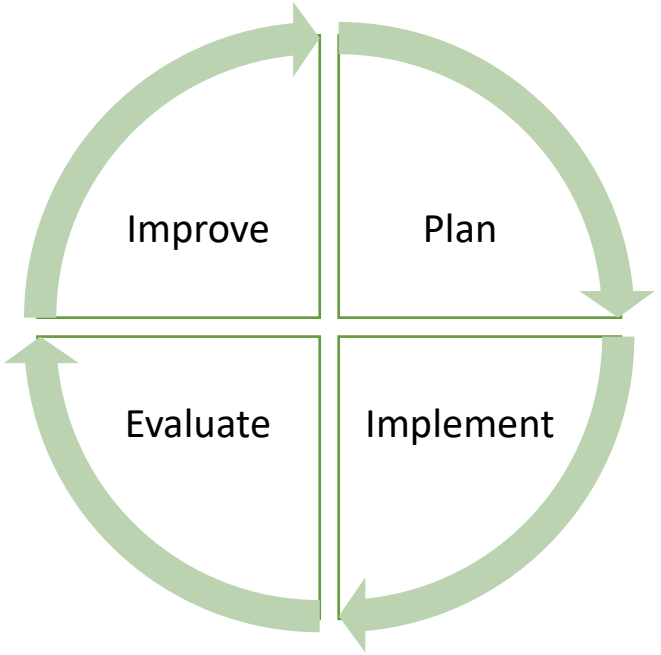
- Too complex
- Disconnected systems
- Lack of Communication
- Lack of feedback for improvement
- Lack of resources
- Lack of ownership/accountability



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Planning Model

The Four-Phase Model



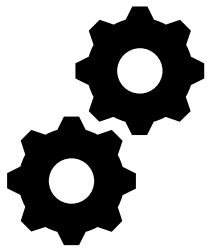
Plan

- Purpose: define shared vision, priorities, and measurable goals
- Key questions: What is the problem we are attempting to solve? What outcomes do we want to achieve?
- Example: problem- lack of mental health services for students; outcomes- better retention



Implement

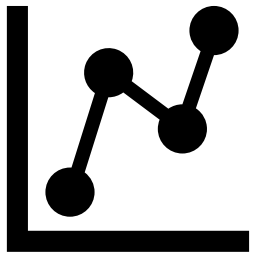
- Purpose: Align resources; execute strategies
- Key questions: What actions will bring the plan to life? Who is responsible?
- Example: action- BHA grant, lead- Dean of Students



Evaluate

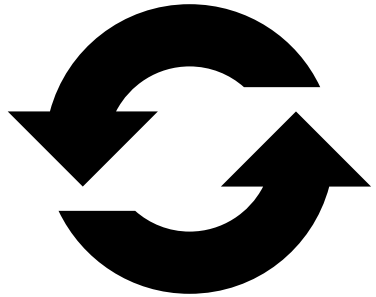
- Purpose: Measure progress against defined criteria
- Key questions: How do we know if we're making progress?

  What data is crucial to track?
- Example: progress- survey results & usage data



Improve

- Purpose: Use the results to adjust, refine, and strengthen
- Key questions: What worked? What needs to change?
- Example: change- new services





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Tools & Templates

Tools & Integration at HCC

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- **Qualtrics** → directly connects outcomes, resource requests, and goals.
- **Ellucian Budget Module** → ties financial resources to planning.
- **Watermark PSS** → centralizes documentation.
- **Integration across systems** → reduces duplication, improves transparency, makes data accessible for decision-making.

Activity- Planning Pain Points

Think about a plan that fell flat. What happened?

Examples in action

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- Templates that help align unit planning to strategic goals
- Integration of assessment results with budget requests
- Dashboards and reports that track goal attainment

Template Examples

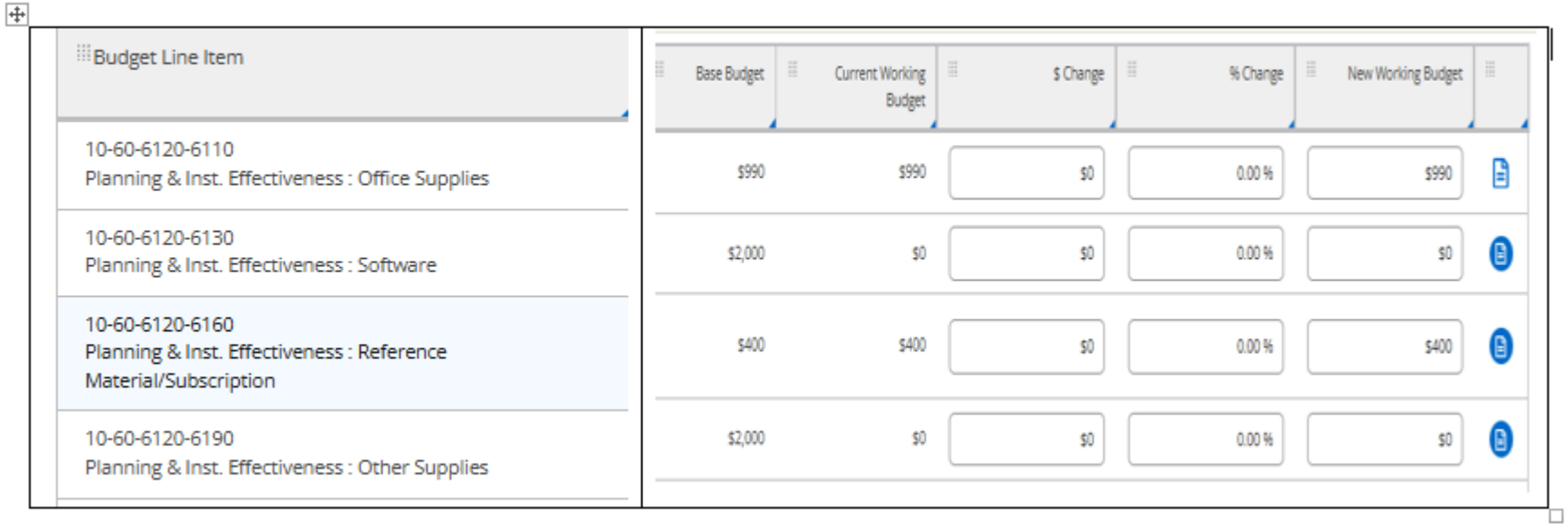
Unit Planning Fall 2025 - Closing the Loop

Closing the Loop is a critical step in the Unit Planning process. Taking time to reflect on what has worked well and what has not allows us to focus our limited resources where they can have the greatest impact. This reflection should be informed by data such as KPIs, SLOA results, survey findings, and other information from previous years.

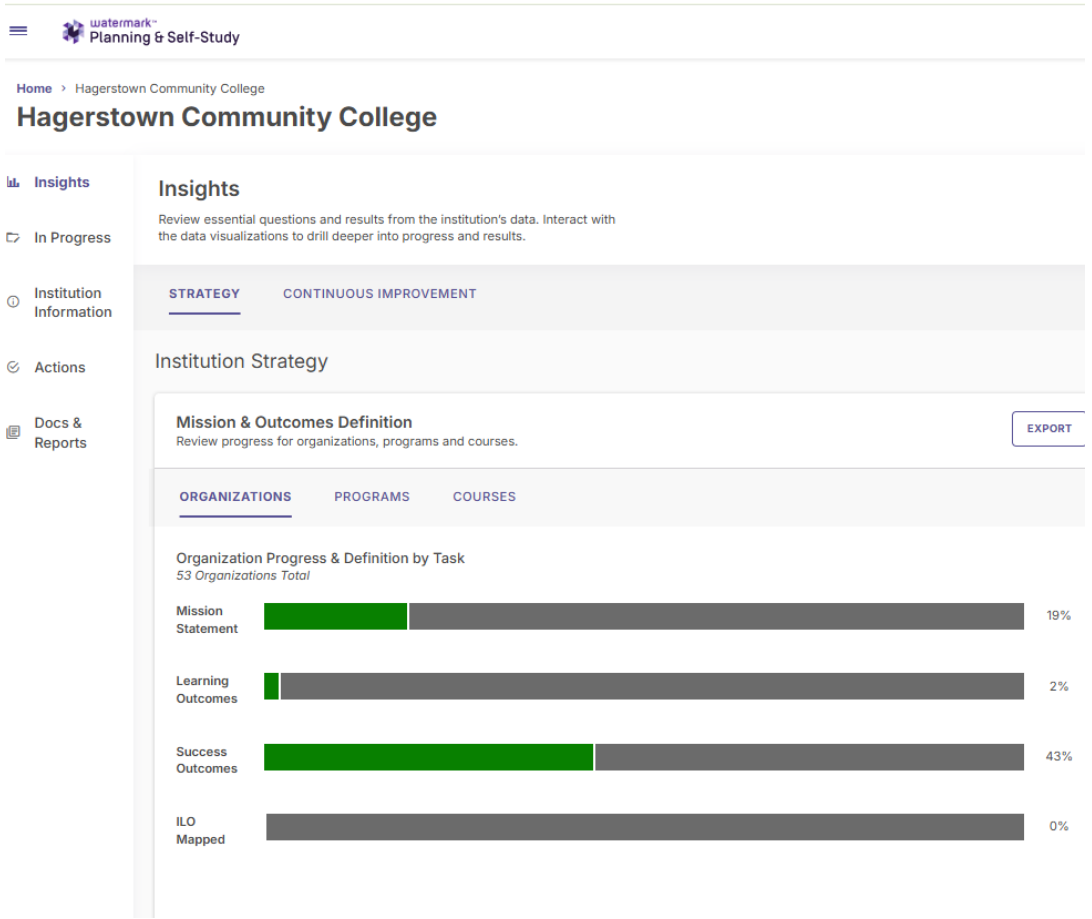
The central question to address is: "**How did your unit use data to make changes within its processes and procedures?**"

The insights gained from your unit's assessment data should directly inform your upcoming goals, action plans, and budget requests. By intentionally using evidence from past performance, HCC can ensure that future initiatives are both data-informed and aligned with institutional priorities.

Budget example



Budget Line Item	Base Budget	Current Working Budget	$ Change	% Change	New Working Budget
10-60-6120-6110 Planning & Inst. Effectiveness : Office Supplies	$990	$990	$0	0.00 %	$990
10-60-6120-6130 Planning & Inst. Effectiveness : Software	$2,000	$0	$0	0.00 %	$0
10-60-6120-6160 Planning & Inst. Effectiveness : Reference Material/Subscription	$400	$400	$0	0.00 %	$400
10-60-6120-6190 Planning & Inst. Effectiveness : Other Supplies	$2,000	$0	$0	0.00 %	$0


watermark
Planning & Self-Study
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Insights
In Progress
Institution Information
Actions
Docs & Reports
Insights
Review essential questions and results from the institution's data. Interact with the data visualizations to drill deeper into progress and results.
STRATEGY
CONTINUOUS IMPROVEMENT
Institution Strategy
Mission & Outcomes Definition
Review progress for organizations, programs and courses.
EXPORT
ORGANIZATIONS
PROGRAMS
COURSES
Organization Progress & Definition by Task
53 Organizations Total
Mission Statement
19%
Learning Outcomes
2%
Success Outcomes
43%
ILO Mapped
0%

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LEARNING OUTCOMES | SUCCESS OUTCOMES

Learning Outcomes articulate the knowledge, skills, and dispositions attained by students through learning and/or co-curricular experiences.

ILO1. Responsibility

Exhibit personal and social responsibility by practicing self-direction, persistence, lifelong learning, and responsible citizenship.

Mapping: *35 Connections*
Assessment Status: Not Assessed

MANAGE MEASURES

ILO2. Globalization and Diversity

Explore and analyze new ideas, and understand the value of moral sensitivity and cultural diversity.

Mapping: *23 Connections*
Assessment Status: Not Assessed

MANAGE MEASURES

ILO3. Critical Thinking and Communication

Practice intellectual skills such as critical and independent thinking, effective communication, and knowledge acquisition and application.

Mapping: *48 Connections*
Assessment Status: In Progress

MANAGE MEASURES

ILO4. Scientific and Quantitative Reasoning

Process, analyze, and synthesize scientific and numerical data, and apply mathematical concepts appropriately.

Mapping: *32 Connections*
Assessment Status: Not Assessed

MANAGE MEASURES

ILO5. Information Literacy and Technology

Apply the research process to access information and use technology to analyze, evaluate, synthesize, and use information resourcefully.

Mapping: *37 Connections*
Assessment Status: Not Assessed

MANAGE MEASURES

ILO6. Professionalism

Apply the knowledge and skills gained from academic discipline to complete personal and professional goals.

Mapping: *35 Connections*
Assessment Status: Not Assessed

MANAGE MEASURES

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LEARNING OUTCOMES | SUCCESS OUTCOMES

Success Outcomes articulate other indicators of student success that are not directly tied to mastery of learning outcomes.

Continuous Quality Improvement

Mapping: *4 Connections*
Assessment Status: Not Assessed
MANAGE MEASURES

Curriculum and Teaching Excellence

Mapping: *3 Connections*
Assessment Status: Not Assessed
MANAGE MEASURES

Student Retention and Program Completion

Mapping: *1 Connection*
Assessment Status: Not Assessed
MANAGE MEASURES

Community and Business Partnerships

Mapping: *No Connections*
Assessment Status: Not Assessed
MANAGE MEASURES

Human Resource Development

Mapping: *2 Connections*
Assessment Status: Not Assessed
MANAGE MEASURES

Technology and Facility Enhancements

Mapping: *No Connections*
Assessment Status: Not Assessed
MANAGE MEASURES

Financial Resource Development

Mapping: *1 Connection*
Assessment Status: Not Assessed
MANAGE MEASURES

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Strategic Plans

Filter by All Organization Types

President's Priorities FY26

MANAGE STRATEGIC PLAN

Organization: **Hagerstown Community College**

No Commitments have been created for this Strategic Plan.

2026 HCC Strategic Plan- Committed to Excellence

MANAGE STRATEGIC PLAN

Organization: **Hagerstown Community College**

6 Commitments | 32 Strategic Goals

Strategic Goals Mapped to Outcomes

Not Mapped Mapped



Commitment 1: Enrollment

3 Strategic Goals

Recruitment and outreach strategies	*0 Tactics*	*1 Mapped Outcome*
Publicize and promote financial aid	*0 Tactics*	*0 Mapped Outcomes*
Key population segments	*0 Tactics*	*0 Mapped Outcomes*

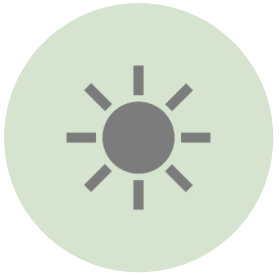
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Strategies to implement

From flat plans to living strategies



Shared, simplified language



Clear beats clever; utilized visuals



Improving transparency and buy-in



Side-by-side comparisons (old vs. new)

Putting strategies to work



FOSTER COLLABORATION



TRACKING, REVISITING,
REFINING PLANS ACROSS UNITS



TEMPLATES FOR REPORTING,
EVALUATION, AND REFLECTION

Activity- One small shift

What's your biggest planning barrier?

Brainstorm a few potential solutions.

What's one step you can take at your institution?



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Conclusion

What we learned along the way

Clarity matters: simple language keeps people engaged; training helps with skill development

Integration builds trust: connecting budgets, assessment, and plans makes the process more meaningful

Planning is iterative: it's not an event, it's a cycle

Key Takeaways

> *"Planning isn't paperwork — it's how we move from strategy to impact."*

Strategy

Vision, mission, & goals

Planning

Turning ideas into action steps

Impact

Student success & community change

Final reflection

What phase of planning at your institution needs the most support?

Questions



Contact Info

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