The pie chart below depicts the biennial planning and evaluation process employed at Hillsborough Community College. Starting at the top and proceeding clockwise, the biennial plan is developed in year one (right half of pie). Year two (left side) represents the 1st year of plan implementation. Thus the 2nd year of implementation will always coincide with development of the next plan.

Though conceptually presented in the graph as a sequential progression, the cyclical nature of planning & evaluation results in practices that are more simultaneous than successive.

**Even-Numbered Year Activities (right half of chart, e.g. 2004/05)**
1. Develop new biennial plan
2. Implement 2nd year of the current biennial plan

**Odd-numbered Year Activities (left side of chart, e.g. 2005/06)**
1. Implement 1st year of new biennial plan
2. Complete final progress report of preceding biennial plan

--- Endorsed by President’s Cabinet, 4/28/04. Revisions 3/30/15.
The biennial college planning process is the vehicle by which Hillsborough Community College integrates the comprehensive strategic plan of the college with action plans at all unit levels. The planning process also serves as a mechanism for linking strategic planning with other supporting infrastructures such as budget development, human resource management, facilities master plans, and technology plans.

Development of the college plan begins July 1 of the even numbered academic year (e.g. 2004/05) and by its conclusion (June 30) results in an Institutional Effectiveness Plan to guide college activities for the next two academic years (e.g. 2005-06 and 2006-07). For more detail reference the following text and tables.

**July 1 to December 31**

**Strategic Analyses**
The process is initiated in the summer through two strategic analyses, one internal and one external to college operations. The internal analysis is an examination of college performance as revealed in the Critical Success Factor document.

As pioneered at the MIT Sloan School of Business, “critical factors” identify those key areas in which satisfactory performance is essential for an organization to achieve its mission and goals. In other words, the factors identify core functions that are mission-critical to an organization.

Each critical “factor” contains multiple measures of institutional performance. Reporting on the measures is a culmination of the results of numerous assessments and evaluations that occur continually throughout the institution. Factors and measures correspond to college goals indicating progress toward their achievement.

The external analysis takes form as an environmental scanning exercise that anticipates trends, events, and emerging issues thought likely to impact the college during the next two years or beyond. The methods of the analysis may vary in context to the issues of the time. Independent of method, the external analysis should inform strategic direction from a perspective of external opportunities and threats forecast to effect the college.

Collectively, these studies represent an analysis of internal strengths, weaknesses and external opportunities and threats (S.W.O.T.).

**Review of Mission, Vision, and College Goals**
The strategic analyses inform the president’s cabinet as they prepare to review the college strategic plan for its continued relevancy. The strategic plan consists of the institution’s mission, vision, values, goals and strategic initiatives. The strategic plan is circulated throughout the college community and external constituencies for feedback, after which Cabinet drafts modifications as needed to align the strategic direction of the college in accord with its assessed strengths and weaknesses and anticipated opportunities and threats. The strategic plan is reviewed at least biennially with the Board of Trustees during a summer workshop and then forwarded for approval at a regular meeting if revisions are advised.
Development of Unit Action Plans

In the fall, the president prepares a planning memorandum that includes the approved strategic plan and any special instructions for completing the two-year unit plans. Every academic and administrative unit prepares an action plan to address fulfillment of college goals and strategic initiatives.

Administrators, faculty, and staff members develop three to six unit objectives within the context of college goals. An objective is viewed as an activity that upon achievement will improve or advance the college. An objective is not a continuation of status quo.

The derivations of objectives are manifold. Objectives can stem from the results of episodic and continual analyses such as program review recommendations, accreditation reports, Critical Success Factor findings, external planning assumptions, administrative and governing board initiatives, state and federal mandates, survey results, fiscal audits, licensure exam pass rates, enrollment reports, and so forth.

Each objective, as developed on an electronic planning system, must contain the following:
1. A linkage to college goals and other initiatives such as state performance standards, program review recommendations, etc.;
2. Expected results or student outcomes as a result of the accomplishment of the objective;
3. Means of assessment to evaluate the accomplishment of outcomes;
4. Strategies to accomplish the objective;
5. Identification of a person responsible;
6. A target date for completion; and
7. Detail of fiscal resources required, if any, for accomplishment.

Subsequent unit planning reports must document progress toward the achievement of each objective using the results of evaluations. All unit plans are due by mid-December.

January 1 to June 30

Linkage to Fiscal and Human Resource Support

The annual budget process follows completion of the unit action plans and/or progress reports. Beginning in January, additional funding needs identified in the unit plans are prioritized by Cabinet. The unit plans also inform development of unit budget requests for the upcoming fiscal year as entered into the budget module of the administrative software.

Employee evaluation instruments require that employee objectives support college goals. Employee objectives should also correspond to unit planning objectives if the employee fills the position identified as responsible for its achievement.

Identification of employee objectives is completed in the spring through summer following development of unit plans and budget or on their employment anniversary date subject to their
classification. Assessment of employee goal attainment occurs at the conclusion of the annual appraisals.

The Planning Documents
The preceding activities culminate in the biennial *Institutional Effectiveness Plan* published in the summer. The Plan documents intended actions to be pursued toward the achievement of college goals. The *Institutional Effectiveness Plan* contains the following components:

1. The planning and evaluation process;
2. Summary of accomplishments from the previous biennium;
3. Environmental planning assumptions;
4. A statement of college mission, vision, and goals; and
5. Selected divisional, campus, and departmental objectives.

The schematic below summarizes activities from July 1 to June 30 leading to development of the biennial college plan.

**Development of the Biennial College Plan**
**July 1 to June 30**

**Summer** (even number year, e.g. 2004)
- Internal Analysis (Critical Success Factors)
- External Analysis (Environmental Scanning)

- Review of Strategic Plan (Cabinet, Board, et. al.)

**Fall**
- Development of Unit Tactical Plans (Administrators, faculty & staff define objectives)

**Spring**
- Annual Budget Development (Including funds as needed to accomplish objectives)
- Annual Job Appraisals (Including employee goals to accomplish unit objectives)

Completion of College Plan document (e.g. 2005-07)
**Beyond June 30**

**Implementation, Evaluation, and Use of Evaluation Results**

On July 1 action commences toward achievement of college goals and unit objectives for the following two academic years. Implementation of a biennial plan will overlap in the second year with development of the one to follow. A final progress report is made after completion of the biennium.

Two mechanisms report progress toward Plan implementation. At the college level the *Critical Success Factor* document is completed in the summer providing empirical evidence of performance toward the achievement of college goals. The results of this evaluation are presented to the college community and Cabinet for their preparation to determine the adequacy of the strategic plan and unit performance. As needed, modifications are made in response to evidence presented in the *Critical Success Factor* document.

Each fall, all units report progress toward the accomplishment of objectives. For every objective a report is required indicating tactical adjustments made as a result of evaluation findings. This is also an opportunity to modify the plan based upon a use of evaluation results and changing circumstances. Revisions are possible for every element within the unit plan including the addition and alteration of objectives. Objectives cannot be deleted but can be designated as “aborted” accompanied by a reason in the “use of results” field.

The timing of the biennial planning process allows a biennial plan to be altered twice between conception to conclusion. Following plan development and initial implementation on July 1, there is opportunity to adjust the plan that fall. In the following fall (the mid-cycle) progress reports are completed and plans can be adjusted again. The next fall a final report of progress is filed and can be used to inform the new plan.

**Planning Timeline**

The process defined above results in planning and evaluation activities for a single biennium to span four academic years as shown in the table below.

<table>
<thead>
<tr>
<th>Year</th>
<th>Planning &amp; Evaluation Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Year One, even numbered year, e.g. 2004-05</td>
<td>Develop biennial plan</td>
</tr>
<tr>
<td>Year Two</td>
<td>Implement 1st year of biennial plan</td>
</tr>
<tr>
<td>Year Three, even numbered year</td>
<td>Implement 2nd year of biennial plan; Evaluate &amp; report progress of 1st year (mid-cycle); Develop next biennial plan</td>
</tr>
<tr>
<td>Year Four</td>
<td>Evaluate &amp; report progress of 2nd year (final report) Implement 1st year of new biennial plan</td>
</tr>
</tbody>
</table>