

ANNUAL WORK PLAN

AY 2020-2021



This guide will assist you in developing and monitoring a yearly work plan for your area of responsibility (e.g. academic program, department, committee, or senate).

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WHAT IS IT AND WHY DOES IT MATTER?

The annual work plan demonstrates how the activities of your area contribute to or support the achievement of Helena College's strategic goals and objectives, a necessary component in determining mission fulfillment as required for accreditation by the NWCCU¹.

Each area must **identify 3-5 strategic goal objectives** and describe the actions they plan to take in the next academic year to further that objective. The IDEA Committee will evaluate the plans individually and as a whole to determine the extent of our institutional commitment to and progress toward our strategic goals. The results of the evaluation will inform subsequent planning, prioritization, and allocation of resources, both at the area and the institution level.

Annual work plans should:

- Be clear and concise.
- Function as an overview of the area's goals and priorities for the year.
- Demonstrate thoughtful planning and reflection. While we do want to accomplish our goals, the plans are about the process as much as the performance.
- Be collaborative. Consider how your work intersects with other areas and college-wide efforts.
- Complement and align with five-year internal program reviews. Essentially, five years of annual work plans should form the basis for the review.
- Be shared with all members of the area and inform for employee performance reviews.

AY 2020-2021 PRIORITIES

Cabinet has identified **7 strategic goal objectives** as priorities for this year. Each area is encouraged, though not required, to incorporate these objectives into their work plans for the year:

- 2.2:** Utilize research and assessment data to make evidence-based decisions regarding curriculum, instruction, and programming.
- 2.3:** Demonstrate that students have learned requisite knowledge and skills relevant to their educational goals.
- 3.1:** Foster collaborative partnerships with business, industry, and the broader community to enhance workforce development and lifelong learning.
- 3.2:** Evaluate and respond to ongoing and emerging community educational and workforce needs.
- 3.3:** Expand civic engagement opportunities through work-based learning and other real-world educational experiences.
- 5.3:** Device and implement performance metrics for assessing progress towards identified goals.
- 5.4:** Maintain and systematically assess a strategic enrollment plan that supports the mission of Helena College.

¹ Northwest Commission Colleges and Universities, regional accreditor, see [Year 1 Self-Evaluation Report](#) (2018).

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BACKGROUND & ORIGINS OF THE ANNUAL WORK PLAN

The implementation of the annual work plan represents the continual evolution of Helena College's planning and assessment framework in response to feedback and recommendations from the NWCCU. Two recommendations emerging from our Year Seven Mission Fulfillment and Sustainability report and site visit prompted a comprehensive revision of our mission, strategic plan, and core themes. The IDEA Committee (formerly SPAA – Strategic Planning, Assessment, and Accreditation) developed these revisions and the NWCCU accepted the report in 2018. More information can be found on the [Accreditation page of the Helena College website](#).

We have begun our next seven-year accreditation cycle with a refined mission, a more focused strategic plan, and a set of reframed core themes to improve planning, decision-making, allocation of resources, and determination of mission fulfillment. The annual work plans have replaced the former annual program assessment plans, in order to provide a more straightforward and effective method to demonstrate how all areas on campus are working to achieve the College's mission as guided by the strategic plan and core themes.

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TIMELINE

In the event of a change of date, plan developers will be given sufficient advance notice.

Initial Plans		
Date	Activity	Plan Status
Sept. 8, 2020	AY 2020-2021 work plans open for editing	Initial Editing
Oct. 9, 2020	AY 2020-2021 initial work plans due for supervisor review (if applicable). <u>Required sections:</u> <ul style="list-style-type: none">• Mission• Narrative• 3-5 strategic goal objectives selected and for each:<ul style="list-style-type: none">○ Responsible Party○ Planned Term Completion○ Action Item(s)○ Indicator(s)	Initial Submitted
Oct. 15, 2020	Supervisors review plans, provide feedback, and approve plans (where applicable),	Initial Supervisor Reviewed
	If plans do not require supervisor review, plans due to IR on this date.	Initial Submitted
Oct. 16, 2020	All plans accepted by IR by the end of the day.	Initial Accepted
Oct – Nov., 2020	IDEA Committee reviews plans and provides constructive feedback to plan developers. Initial campus-wide report assembled and distributed to campus, IDEA committee, and Cabinet.	

Mid-Year Plans		
Date	Activity	Plan Status
Early spring 2021	Plan developers are encouraged to check in on progress of plans. Developers may submit their plans for review by IR/IDEA if desired.	Mid-Year Submitted

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Final Plans		
Date	Activity	Plan Status
Late spring semester 2021 (date TBD)	Final AY 2020-2021 work plans may be submitted early (see June 30 below for required sections and full process).	Final Submitted
	Plan developers may begin a draft of AY 2021-2022 plans to be entered into the database at a later date.	
June 23, 2021	Final annual work plans due for supervisor review (if applicable) for all programs. <u>Required Sections:</u> <ul style="list-style-type: none"> • Final Budget Narrative • Annual Plan Final Narrative • For each goal: <ul style="list-style-type: none"> ○ Results ○ Future Actions ○ Goal Status 	Final Submitted
June 29, 2021	Supervisors review plans, provide feedback, and approve plans (where applicable),	Final Supervisor Reviewed
	If plans do not require supervisor review, plans due to IR on this date.	Final Submitted
June 30, 2021	All plans accepted by IR by the end of the day.	Final Accepted
July-August 2021	IDEA Committee reviews plans and provides constructive feedback to plan developers. Final campus-wide report assembled and distributed to campus, IDEA committee, and Cabinet	

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PROCEDURE

1. Access the annual work plans from the **Employee Portal** on the Helena College website. Go to **Assessment Database** in the Academics section.
2. Sign in with your NetID.
3. You may need to go to **College Assessment** in the top menu and select **Annual Work Plan**.
4. You will be able to view plans for which you are the designated plan developer. Select the plan you wish to edit from the drop-down menu.
 - a. For more about each section, see Definitions, beginning on page 7.
 - b. Any goals that were marked “Ongoing” or “Deferred” in the previous year’s plan will automatically populate in your current plan. Please review the content to ensure it contains up-to-date information.
5. As you work, you will need to save your plan in two places:
 - a. **Save Goal Status** saves your work on the *goal that is displayed*. You will need to select each goal from the dropdown menu directly under “Plan Goals,” make edits, and save it.
 - b. **Save Plan Status** saves your work in the “Plan Details” section (see more about the various status types in the Definitions section, starting on page 7). *You can think of this as the final “Save” button to hit.*
 - i. When your plan is complete, change the plan status to the appropriate “Submitted” status for the time of year.
 - ii. If any required fields are missing, your plan status will automatically change to “Issues.” A message will display at the top of the page with more information about what is missing.
 - iii. Make the required changes and change the plan status back to Submitted.
6. Submitted plans (both initial and final) will be reviewed by a supervisor, where applicable. Supervisors are encouraged to provide constructive feedback and change the plan status to “Supervisor Reviewed” when all work on the plan is complete.
 - a. If your plan does not have a supervisor listed under Plan Details, no supervisor review is necessary.
7. The Institutional Researcher will review plans and mark them as “Issues” if more changes are needed, or “Accepted” if the plan looks complete.
8. Export your plan to save a copy for your records or share with your department by selecting **View Plan Report for exporting** at the top of the “Plan Details” section.
 - a. First, select the current year by scrolling all the way down below the Area ID section on the right side of the screen, then select your area.

The database is set to time out after 125 minutes. Save your work frequently and/or work on your text in the template, then copy and paste it into the database.

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DEFINITIONS

Fields Required for the Initial Plan

Plan Details Section

- **Plan Status:** Save as Editing if you are working on the plan. Save as Submitted if you have completed the required sections and are ready for review.
 - Issues: A field is missing or the IR has reviewed your plan and provided suggestions for improvement. Make the suggested changes and change your status back to Submitted.
 - Supervisor Reviewed: Your supervisor has reviewed your plan and may ask you to make adjustments. This status indicates they are satisfied with the plan.
 - Accepted: The IR has accepted your plan and it is ready for review by the IDEA Committee.
- **Mission:** Enter the mission statement for your area.
 - All areas are strongly encouraged to develop mission statements, which should describe the purpose of your area and its relationship to the overall mission of Helena College.
- **Narrative:** Enter additional information about your area that may be relevant, such as the names of committee members or officers, additional background, or unusual circumstances affecting your area for the current academic year.

Plan Goals Section

- **Select Plan Goal:** The database displays one goal at a time. Each area must have between 3 and 5 goals. You may choose any combination of objectives from different strategic goals or multiple objectives related to one strategic goal.
- **Strategic Goal & Goal Objective:** You must first select a strategic goal in order to select an objective in the next section. Refer to the current [Strategic Plan](#).
- **Responsible Party:** The person/people responsible for carrying out the action item(s) and assessing the results. This may be the plan developer, another member of the area, the entire area, or another person/area with whom you will collaborate.
- **Planned Term Completion:** Select the term you plan to complete the action item(s).
- **Action Item(s):** Describe the action(s) your area will take *this academic year* to advance the selective strategic goal objective. Effective action items are SMART, meaning they possess these five qualities:
 - **S**pecific
 - **M**easurable
 - **A**chievable
 - **R**elevant
 - **T**ime-bound
 - [More about SMART goals](#).
- **Indicator(s):** Describe how you will measure the extent of completion or determine the success of your action items. These may also be considered outcomes or anticipated results.

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Fields Required for the Final Plan

Plan Details Section (recommend completing last)

- **Final Budget Narrative:** Provide a brief summary of spending activities for the year, especially as they relate to the work plan. Address any discrepancies between allocations and expenditures and any budget modifications.
- **Final Narrative:** Look at the plan and academic year as a whole. Summarize your progress and how it will influence your next year of work.

Plan Goals Section

- **Results:** Describe what actually happened this year, including the actions taken and the outcomes of the actions. This should directly correlate with the action items and indicators described at the beginning of the year. Even if you weren't successful or didn't accomplish an action item, state that here and mention any contributing factors.
- **Future Actions:** What's next? Reflect on how these outcomes will inform subsequent planning for your area. You may continue a successful activity as is, or improve on it. You may decide it's done and that's the end of it. You may drastically change an action item or scrap an unsuccessful one altogether. You may even end up passing responsibility for an action item to another area on campus.
- **Goal Status**
 - Completed [term]: Action item(s) have been started and finished.
 - Not completed: Actions item(s) have not been started, or have not been completed, with no future plans to complete them.
 - Ongoing: Action item(s) will continue to be carried out.
 - In Progress: Action item(s) started, but not completed; will carry into next year.
 - Deferred: Action (s) not started, will carry into next year.