

INSTITUTIONAL DEVELOPMENT, EFFECTIVENESS, AND ACCREDITATION

MEETING ON SEPTEMBER 2, 2025, AT 1:00 PM, DON 132

MINUTES

Helena College Mission: Helena College supports our diverse community by providing the paths and tools necessary to assist learners in achieving their educational and career goals.

IDEA Council Mission: The Institutional Development, Effectiveness, and Accreditation Council is a representative body whose mission is to advance the strategic direction of Helena College through assessment and planning. The committee also has oversight for activities related to maintaining institutional compliance with regional accreditation policies and standards.

Attendees

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| • Jessie Pate (Chair) , Director of Institutional Research & Effectiveness | • Abby Rausch , Director of Marketing, Communications, and Alumni Relations |
| • Marika Adamek , Assistant Registrar | • Bryon Steinwand , IT & Programming Instructor, Assessment Database Developer |
| • Katelynn Eberhardt , Director of Student Wellbeing and Engagement | • Cody Torres , Welding Instructor |
| • Nathan Munn , Psychology Instructor | • Paige Payne (Recorder) , Executive Assistant |

Priorities for AY2526

1. Carry out the institutional assessment plan.
2. Coordinate the collection of data in support of strategic goal IM-1 (community engagement).
3. Recommend leading indicators and real-time metrics aligned with each KPI under the new metrics tree model.
4. Prepare two ad hoc reports and coordinate one virtual visit in response to NWCCU recommendations.

Pre-Reads/Supplemental Materials

- IDEA Minutes 20250805
- SP 2022-27 Strategic Goal Tracking: ST-1 and ST-2, pp. 5-7
- NWCCU Ad Hoc Report Recommendation 5 (will email when available!)

Agenda

Approve minutes: IDEA Minutes 20250805

- Cody Torres motioned to approve the minutes, and Marika Adamek seconded. Approved.

Institutional Assessment Plan: Strategic Goal Stewardship-1

Develop and implement a new budget process that is data-driven, transparent, and aligns with our strategic plan. This process will include a 10-year master plan with renewal and replacement schedules for capital assets.

Targets & Progress to Date from Cari Schwen Interview:

1. A new budget process will be established. This process will rely on performance metrics such as enrollment, retention, completion, and labor and industry data for fund allocation.
 - a. Executive Director of Fiscal Services has a contribution margin for programs and a breakeven model for courses, but is not sure where to go from here.
 - i. Proposing to use the breakeven model to decide if we should be offering a class/program with low enrollment.
 - ii. Piloting the breakeven model and contribution margin with the Fire & Emergency Services program review this year.
 - iii. Demonstrate the model with Robyn and Stephanie and/or all academic leaders this AY.
 - b. The budget model for FY26 will ask departments to budget the upcoming FY and forecast the two to three years following. This was established as part of a new institutional assessment plan and serves as a first step in encouraging departments to do more long-term financial planning.
 - c. Helena College is contracting with Trivium BI to develop dashboards that merge student achievement data with financial data by program. GFC worked with the same company to develop this, and they are very happy with it, but the cost is over the threshold, so we must complete a sole-source justification before we can move forward.
2. Each area on campus will develop a 10-year master plan for its assets, which will include an inventory and replacement/renewal schedules.
 - a. This action needs more involvement from the departments. Cari knows what needs to be done, and programs are recognizing the need to do it, but the process has not been developed yet.
 - b. Stephanie will start working with welding and machining to develop the process/template to roll out to all areas. They are focusing on a 2 to 3-year plan currently.
 - c. Kelley's new Space Allocation and Optimization Committee will include work on the Long-Range Building Plan to support long-term financial planning.
3. Increased staff/faculty satisfaction with the departmental budget process by 10%
 - a. College Employee Satisfaction Survey (CESS) Q4.11: "My department has the budget needed to do its job well."
 - b. 2024 satisfaction scores decreased from 2021 but remained within an acceptable threshold. Employees still need more education on efforts to improve the budget process and eliminate the "use it or lose it" mindset that persisted for some time in the past.
 - c. Future discussion: consider a more accurate "acceptable threshold" than 90% of the target

Q#	Question Text	Baseline (2021)	Target	90%	Fall 2024	Score
4.11	My department has the budget needed to do its job well.	3.54	3.89 (increase 10%)	3.50	3.51	1

4. Increased employee satisfaction pertaining to planning by 15%.
 - a. CESS Q1.7: "This institution involves its employees in planning for the future."
 - b. CESS Q1.8: "This institution plans carefully"
 - c. CESS Q1.13: "This institution makes sufficient budgetary resources available to achieve important objectives."

- d. 2024 satisfaction scores for Q1.7 decreased while the other two increased slightly. Dean's Cabinet would be curious to learn more from employees as to why scores decreased or did not increase as much as desired, though the ideal time to do so may have passed.
- e. Consider a more accurate "acceptable threshold" than 90% of the target.
 - The 90% threshold is a holdover from the previous director. What is a better way to describe reaching an acceptable target threshold?

Q#	Question Text	Baseline (2021)	Target	90%	Fall 2024	Score
1.7	This institution involves its employees in planning for the future.	3.70	4.25	3.83	3.56	0
1.8	This institution plans carefully.	3.42	3.93	3.54	3.50	0
1.13	This institution makes sufficient budgetary resources available to achieve important objectives	3.42	3.93	3.54	3.69	1

IDEA Discussion & Recommendations 9/2/2025

1. New budget model:
 - a. New budget models need to maintain space for departments that currently do not have a budget, but may need one in the future.
 - b. Trades budgets are difficult to project due to the constantly changing value of consumables (e.g., steel). Some work has been done to request future quotes from vendors, but this has just shown how volatile markets can be. The amount of materials used can also vary from year to year depending on students, teaching practices, etc.
2. 10-year plan:
 - a. Restructuring course fees into program fees has been very helpful for welding as they begin long-term planning.
 - b. Constantly changing state/UM rules also make long-term planning challenging.
- 3./4. Satisfaction with budget and planning:
 - a. Include previous survey administrations to better understand trends.
 - e. Faculty continue to feel like the budget process is not very transparent ("shell game").
 - i. They have not been receiving updates from faculty representatives on the Budget Council.
 - ii. Understand the need to make decisions to keep the college financially stable, but still feel a little out of the loop on decisions relating to their own budget – feels like they are given a set amount to spend and need to just figure it out.
 - c. Staff and directors not on the Budget Council (BC):
 - i. The staff do receive updates from the BC representative.
 - ii. Have seen the impact of constantly changing rules on individual budgets and on the Business Office, so it is hard to keep up with the changing rules and procedures.
 - iii. Reiterate the role of representatives on committees. For example, how does Katelynn get budget updates? She is on the CCC but cannot attend.
 - iv. Staff and faculty channels of communication are straightforward; directors not so much.
 - e. Surpluses at the end of the year can sometimes be allocated/spent quickly – a decision is made by representatives on the BC.

- f. Employees could use more education and communication in plain language about what's going on with the budget.
- g. Consider an MMM column around the budget.

Next meeting: Tuesday, September 16, 2025