ANNUAL WORK PLAN
AY 2021-22

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).

Please direct questions to Jessie Pate, Director of Institutional Research & Effectiveness.

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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 NWCCU[1].

Each area must **identify 3-5 strategic goal objectives** and describe the actions they plan to take in the next academic year and how they support that objective. Your supervisor or the IR will review the plans both for their own knowledge and to assist in developing a strong plan. The IDEA Committee will evaluate the plans for quality and effectiveness. The results of the evaluation will help determine the extent of mission fulfillment and 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 and be shared with all members of the area
- 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 three- and five-year internal program reviews. Essentially, three or five years of annual work plans should form the basis for the review.
- Relate to employee performance reviews as appropriate, without directly referring to any specific employee's performance

AY 2021-22 PRIORITIES

Cabinet has identified **5 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:

2.3: 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.

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[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 fulfilment. 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**
Aug. 19, 2021	AY 2021-22 work plans open for editing	Initial Editing
Sept. 17, 2021	AY 2021-22 initial work plans due for supervisor/IR review. Required sections: • Mission • Narrative • 3-5 strategic goal objectives selected and for each: o Responsible Party o Planned Term Completion o Action Item(s) o Indicator(s)	Initial Submitted
Sept. 24, 2021	Supervisors or IR review plans, provide feedback, and approve plans.	Initial Accepted
Oct. – Nov., 2021	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**
Feb. 4, 2022	Mid-year updates due for supervisor/IR review. Required sections: • Mid-Year Update for each goal • Mid-Year Narrative	Mid-Year Submitted
Feb. 11, 2022	Supervisors or IR review plans, provide feedback, and approve plans.	Mid-Year Accepted

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Final Plans		
Date	Activity	Plan Status
April 18, 2022	Plan developers notified of option to complete plans by May 13.	Final Editing
May 13, 2022	Final AY 2021-22 work plans may be submitted and approved by supervisor/IR early (see June 24 below for required sections and full process). Work with your supervisor/IR to ensure they approve your final plan.	Final Submitted Final Accepted
	Plan developers may begin a draft of AY 2022-23 plans to be entered into the database upon return in the fall. The Annual Work Plan Template is available for this task.	
May 23, 2022	Plan developers notified of final deadline to submit AY 2021-22 annual work plans.	Final Editing

June 24, 2022	Final annual work plans due for supervisor/IR review for all programs.
	
	Required Sections:
	• Final Budget Narrative
	• Annual Plan Final Narrative
	• For each goal:
	    o Results
	    o Future Actions
	    o Goal Status
		Final Submitted

July 1, 2022	Supervisors or IR review plans, provide feedback, and approve plans.	Final Accepted
July / August 2022	IDEA Committee reviews plans and provides constructive feedback to plan developers. Final campus-wide report assembled and distributed to campus, IDEA committee, and Cabinet. Database is down for updates. Plan developers may use the Annual Work Plan Template to begin planning for AY 2022-23.	
August 2022	Database opens for AY 2022-23 work plans.	

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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.

   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.

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 "In Progress," "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** 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 (initial, mid-year, and final) will be reviewed by a supervisor or the Institutional Researcher. Supervisors are encouraged to provide constructive feedback and change the plan status to "Reviewed" when all work on the plan is complete.

   a. If your plan does not have a supervisor listed under Plan Details, the Institutional Researcher will review your plan.

7. Export your plan to save a copy or share with your department by selecting **View Plan Report for exporting** at the top of the "Plan Details" section.

   a. First, select your area on the right side of the screen, then select the desired year by scrolling all the way down below the Area ID section.

   b. All plans are viewable by all areas, so please keep this in mind as you write your plans.

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DEFINITIONS

Fields Required for the Initial Plan

Plan Details Section

- **Plan Status:**
  - <u>Editing</u>: You are working on the plan.
  - <u>Submitted</u>: You have completed the required sections and are ready for review.
  - <u>Issues</u>: 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 <u>Submitted</u>.
  - <u>Reviewed</u>: Your supervisor reviews your plan and may ask you to make adjustments. This status indicates they are satisfied with the plan.
- **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.
- **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](#). You may choose any combination of objectives from different strategic goals or multiple objectives related to one strategic goal.
- **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.* Effective action items are [SMART](#), meaning they possess these five qualities:
  - **S**pecific
  - **M**easurable
  - **A**chievable
  - **R**elevant
  - **T**ime-bound
  - [Video about writing effective action items and indicators](#)
- **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. Effective indicators will be measurable in some way, such with a count, percent change, publication of a document, etc.

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Fields Required for the Mid-Year Update

Plan Details Section

- **Mid-Year Narrative**: Summarize the progress you have made overall. Mention any obstacles or changes that have come up.

Plan Goals Section

- **Mid-Year Update**: Provide any updates regarding progress toward a goal, whether it's already been accomplished, you've started the work, or something has caused you to change your original plan.

Felds Required for the Final Plan

Plan Details Section (recommended to complete last)

- **Final Budget Narrative**: Provide a brief summary of spending activities for the year, especially as they relate to the work plan. It is recommended that you include your original budget and final anticipated expenses. Even though your expenses will not be finalized yet, you can use both current UMDW reports and your own records. 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 correlate to 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 the outcomes will influence future plans. For example, you may continue a successful activity or improve on it. An action item may be completed and need not further action. 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. You may choose to keep them for another year or not.
  - In Progress**:** Action item(s) started, but not completed. These action items will automatically be displayed in the database next year.
  - Deferred: Action item(s) not started, will carry into next year. These action items will automatically be displayed in the database next year.