

ANNUAL PLANS

AY 2026-27

INTRODUCTION

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

The annual plan demonstrates how the activities of your area align with the defining characteristics of each of the four guiding principles in our strategic plan. Successful completion of these goals contributes to fulfillment of our mission, which we are required to document for accreditation by the NWCCU¹.

Each area must outline 1-3 goals for the upcoming academic year and select the defining characteristic with which they align. Supervisors or the Institutional Researcher will review the plans and provide constructive feedback. The IDEA Council will evaluate the plans to understand extent of mission fulfillment and the Dean's Cabinet will use annual plans to inform institutional planning.

An annual plan should:

- Be a clear and concise account of the area's goals and priorities for the year.
 - While the primary audience is your area, all plans are available to view by all employees.
 - Please spell out acronyms the first time they are used, and consider providing a brief explanation or definition of industry- or field-specific vocabulary.
- Demonstrate thoughtful planning and reflection.
- Be collaborative. Consider how your work intersects with other areas and college-wide efforts.
- Relate to employee performance reviews as appropriate, without directly referring to any specific employee's actual job performance.
- Complement and align with four- and five-year program reviews.

HELP AND SUPPORT

Questions about Annual Plans:

Jessie Pate

Director of Institutional Research & Effectiveness

Jessie.pate@helenacollege.edu

Technical Support for Assessment Database:

Bryon Steinwand

Information Technology & Programming Instructor/Assessment Database Developer

Bryon.steinwand@helenacollege.edu

NEW THIS YEAR

- Plan developers will have the option to align their goals to the Institutional Priorities for AY 2026-27, identified by the Dean's Cabinet in April 2027.

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

TIMELINE

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

Initial Plans

Date	Activity	Plan Status
August 17, 2026	AY 2024-25 work plans open for editing	Initial Editing
Sept. 11, 2026	Initial work plans due for supervisor/IR review. Required sections (see Completing the Plans, Initial Plans): • Mission • Narrative • 1-3 goals and for each: ○ Guiding Principle and Defining Characteristics ○ Responsible Party ○ Planned Term Completion ○ Goal Statement ○ Action Item(s) ○ Indicator(s) ** Optional: Select all of the institutional priorities supported by your goal.	Developer changes to Initial Submitted
Sept. 25, 2026	Deadline for supervisors or IR to review plans, provide feedback, and approve plans.	Supervisor changes to Initial Accepted
Oct. 2026	IDEA Committee reviews plans and drafts campus-wide report of initial plans. Report distributed to Dean's Cabinet and campus.	

Mid-Year Plans

Date	Activity	Plan Status
Jan. 6, 2027	Notification to complete mid-year updates	
Jan. 22, 2027	Mid-year updates due for supervisor/IR review. Required sections (see Completing the Plans, Mid-Year): • Mid-Year Update for each goal • Mid-Year Narrative	Developer changes to Mid-Year Submitted
Feb. 5, 2027	Deadline for supervisors or IR to review plans, provide feedback, and approve mid-year updates.	Supervisor changes to Mid-Year Accepted

Final Plans – Optional Early Deadline

Date	Activity	Plan Status
April 12, 2027	Notified of option to complete AY 2024-25 plans before end of semester.	Final Editing
April 20, 2027	Recommended date for early submission of work plans. See June deadline below for required sections. Notify your supervisor/IR if you are planning to submit early.	Developer changes to Final Submitted
May 4, 2027	Recommended deadline for supervisor/IR to review and approve final plan.	Supervisor changes to Final Approved

Final Plans – Official Deadline

Date	Activity	Plan Status
June 1, 2027	Notification of final deadline to submit AY 2024-25 annual work plans.	Final Editing
June 18, 2027	Final annual work plans due for supervisor/IR review for all programs. Required sections (see Completing the Plans, Final Plans): • Final Budget Narrative • Annual Plan Final Narrative • For each goal: ○ Results ○ Future Actions ○ Goal Status ○ For goals deferred or not completed: Reasons	Developer changes to Final Submitted
June 30, 2027	Deadline for supervisors or IR to review plans, provide feedback, and approve plans.	Supervisor changes to Final Accepted
July / August 2027	IDEA Committee reviews plans and provides constructive feedback to plan developers. Final campus-wide report assembled and distributed to IDEA committee, Cabinet, and campus. Database is down for updates.	

HOW TO ACCESS THE PLANS

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 navigate 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 or supervisor. Select the plan you wish to edit from the drop-down menu.
5. Complete the required areas for each phase of the work plans
 - a. To learn more about each section, see "Completing the Plans," beginning on page 5.
 - b. Any goals that were marked In Progress 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.
 - c. If you decide not to continue work on these goals, **delete them** and provide an explanation in the Narrative section.
6. Submitted plans will be reviewed by a supervisor or the Institutional Researcher (IR). Supervisors are encouraged to provide constructive feedback for final edits by the developer before they change the plan status to Accepted.
 - a. If your plan does not have a supervisor listed under Plan Details, the IR will review it.

The database is set to time out after 125 minutes. Save your work frequently and/or work in a Word document, then copy and paste your content into the database.

Want to share your plan with your department or see previous years' plans?

Select **View Plan Report for exporting** at the top of the Plan Details section.

First, select the desired year on the right side of the screen, then select the area.

You can then download a PDF of your plan.

COMPLETING THE PLANS

For each phase of the plans (initial, mid-year, submitted), you will only see the sections that have already been completed or are required for the given phase.

Initial Plans

1. In the Plan Details section, complete the following:
 - a. **Mission:** Enter the mission statement for your area. All areas are strongly encouraged to develop mission statements.
 - b. **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.
2. In the Plan Goals section, complete the following for each goal:
 - a. **Select Plan Goal:** The database displays one goal at a time. Each area must have between 1 and 3 goals.
 - o To add a new goal, select Add Goal # from the **Select Plan Goal** menu.
 - o Delete a goal by clicking **Delete this Goal** at the bottom of the goal.
 - b. **Guiding Principle & Defining Characteristic:** First select a guiding principle, then select a defining characteristic. Refer to the current [Strategic Plan](#). You may choose any combination of characteristics from different principles or multiple characteristics related to one principle.
 - c. **Institutional Priorities (optional):** Please select any priorities that are supported by your goal. You can select as many as apply.
 - d. **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, or the entire area.
 - e. **Planned Term Completion:** Select the term you expect to accomplish the goal.
 - f. **Goal Statement:** Briefly describe what you want to achieve this year.
 - g. **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:
 - o Specific
 - o Measurable
 - o Achievable
 - o Relevant
 - o Time-bound
 - o [Watch a video from your IR about writing effective action items and indicators](#)

The maximum number of characters for any field is 2000. You will not be able to save your plan if any field exceeds this maximum.

The character count is displayed next to each part of the Plan Goals section.

- h. **Indicator(s):** Describe what successful completion of the goal looks like. These may also be considered outcomes or anticipated results. Effective indicators are measurable.
 - o Examples include (but are not limited to) reaching a target number (40 students in a program) or percent change (reduce expenses by 5%), or publication of a document.
- i. **Save Goal.** **
3. Above the Plan Details section, change the plan status to Initial Submitted and click **Save Plan Status**.

**If any required sections are not completed, or the text is too long, the plan status will automatically change to Initial Issues.

You will see a box at the top of the plan describing the errors. Resolve the errors and change the plan status back to Initial Submitted.

Mid-Year

1. In the Plan Details section, complete the following:
 - a. **Mid-Year Narrative:** Summarize the progress you have made overall. Mention any obstacles or changes that have come up.
2. For each plan goal, complete the following:
 - a. **Mid-Year Update:** Provide any updates regarding progress toward a goal, whether it has been accomplished, you have started the work, or something has caused you to change your original plan.
 - b. **Goal Status:** You have the option to update your goal status at this point. See Final Plans for more information about the goal status options.
 - c. **Save Goal.** **
3. Above the Plan Details section, change the plan status to Mid-Year Submitted and click **Save Plan Status**.

**If any required sections are not completed, or the text is too long, the plan status will automatically change to Mid-Year Issues.

You will see a box at the top of the plan describing the errors. Resolve the errors and change the plan status back to Mid-Year Submitted.

Final Plans

1. In the Plan Details section, complete the following:
 - a. **Final Budget Narrative:** Describe how your available budget supported goal completion or impeded progress. Compare your original budget and final/anticipated expenses, addressing any significant differences. Even though your expenses will not be finalized yet, you can use both current UMDW reports and your own records.
 - b. **Annual Plan Final Narrative:** Reflect on the plan and academic year as a whole. Summarize your progress and how it will influence your next year of work. Mention any anticipated changes, challenges, activities, or opportunities in the next academic year.
2. Complete the following for each goal in the Plan Goals section:
 - a. **Results:** Describe what actually happened this year, including the actions taken and the outcomes of the actions. This should correlate to the indicators described at the beginning of the year. Even if you weren't successful or didn't accomplish a goal, state that here and mention any contributing factors.

- b. **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. A goal may be completed and need no further action. A goal may be passed on to another area. You may scrap an unsuccessful goal altogether, describing what you learned and how you will adapt or pivot.
- c. **Goal Status**
1. Completed [term]: Goal has been completed to the fullest extent possible. This goal will not appear in future work plans.
 2. Not completed: Action item(s) have not been started and goal was not completed, with no future plans for completion.
 3. In Progress: Action item(s) have been started, but more work is needed before the goal is completed. Goal will automatically be included in the next plan.
 4. Deferred: Action item(s) were not started, but will be part of next year's goals. These goals will automatically be included in the next year's plans.
- d. If you select "Not completed," or "Deferred," you will be prompted to select from a list of reasons a goal was not completed this year. Select all that apply.
- e. **Save Goal.** **
3. Above the Plan Details section, change the plan status to Final Submitted and click **Save Plan Status**.

**If any required sections are not completed, or the text is too long, the plan status will automatically change to Final Issues.

You will see a box at the top of the plan describing the errors. Resolve the errors and change the plan status back to Final Submitted.

SUPERVISOR REVIEW

Following each phase of the annual work plans, there is a week for supervisors to review all annual plans for areas they oversee. Supervisors can review each area's priorities for the year and are encouraged to provide constructive feedback for developers to work into their plans.

Areas of focus include:

- Goals are clearly articulated and reflect departmental priorities.
- Goals are appropriately aligned to the strategic plan.
- Indicators are measurable.
- Timelines for completion are realistic.
- Goal status is appropriate.

Once satisfied with the plan, supervisors will change the plan status to Accepted and save it.

BACKGROUND & ORIGINS OF THE ANNUAL PLAN

The implementation of the annual 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 in 2017 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 began 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.

The College adopted a new strategic plan for 2022-2027. While the structure of the plan has changed, the expectations remain for each area to demonstrate how their work aligns with and supports the strategic plan. A primary goal for the new strategic plan was to ensure all departments, programs, and committees could see their work reflected in the document and easily document their contributions.