

ANNUAL WORK PLANS

AY 2022-23



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

The annual work 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 **describe 3-7 action items** they intend to complete in the next 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 Committee will evaluate the plans for quality and effectiveness. The results of the evaluation will help determine the extent of mission fulfillment and inform planning, prioritization, and allocation of resources, both at the area and the institution level.

An annual work plan should:

- Be a clear and concise overview of the area's goals and priorities for the year.
- Demonstrate thoughtful planning and reflection. While we do hope to see goals completed, the plans are about the continuous improvement process as much as the performance.
- 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 three- and five-year internal program reviews. Recommendations from program reviews will appear in annual work plans. Historical work plans should provide a summary of the area's significant activities during the review period.

HELP AND SUPPORT

Questions about annual work plans:

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

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WHAT'S NEW THIS YEAR

AY 2022-23 Priorities

Because this is the first year of a new strategic plan, Cabinet has decided not to set any specific priorities for this year. Instead, each area is encouraged to align their work to as many unique guiding principles and defining characteristics as they are able.

New in the Database

- Link to this document at the top of the page.
- Plan Details section has been rearranged to improve flow.
 - Save Plan Status and Save Plan both save the entire plan and the status.
- Plan goals align to a guiding principle and defining characteristic of the new strategic plan
- If any program review recommendations have been assigned to your area, you will have an additional section to complete for each goal. You will be able to document how your annual plan goals support assigned recommendations and track progress toward completion.
- Only required sections for each phase (initial, mid-year, and accepted) will be displayed.

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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. 15, 2022	AY 2022-23 work plans open for editing	Initial Editing
Sept. 16, 2022	Initial work plans due for supervisor/IR review. Required sections (see Completing the Plans, Initial Plans): <ul style="list-style-type: none">• Mission• Narrative• 3-7 goals and for each:<ul style="list-style-type: none">○ Guiding Principle and Defining Characteristics○ Responsible Party○ Planned Term Completion○ Action Item(s)○ Indicator(s)• Where relevant: selected Program Review Recommendation and Connection to Recommendation	Developer changes to Initial Submitted
Sept. 23, 2022	Deadline for supervisors or IR to review plans, provide feedback, and approve plans.	Supervisor changes to Initial Accepted
Oct. – Nov., 2022	IDEA Committee reviews plans and provides constructive feedback to plan developers. Initial campus-wide report produced and distributed to IDEA Committee, Cabinet, and campus.	

Mid-Year Plans

Date	Activity	Plan Status
Feb. 3, 2023	Mid-year updates due for supervisor/IR review. Required sections (see Completing the Plans, Mid-Year): <ul style="list-style-type: none">• Mid-Year Update for each goal• Mid-Year Narrative	Developer changes to Mid-Year Submitted
Feb. 10, 2023	Deadline for supervisors or IR to review plans, provide feedback, and approve mid-year updates.	Supervisor changes to Mid-Year Accepted

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Final Plans

Date	Activity	Plan Status
April 17, 2023	Plan developers notified of option to complete AY 2022-23 plans early.	Final Editing
May 5, 2023	Recommended date for early submission of work plans. See June 23 below for required sections. Please make sure to notify your supervisor/IR if you are planning to submit early.	Developer changes to Final Submitted
May 12, 2023	Recommended deadline for supervisor/IR to review and approve final plan.	Supervisor changes to Final Approved
	Plan developers may begin a draft of AY 2023-24 plans to be entered into the database upon return in the fall. The Annual Work Plan Template is available for this task.	
May 22, 2023	Plan developers notified of final deadline to submit AY 2022-23 annual work plans.	Final Editing
June 23, 2023	Final annual work plans due for supervisor/IR review for all programs. Required sections (see Completing the Plans, Final Plans): <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 • Where relevant (completed goal that supports a program review recommendation): New Recommendation Status and Justification for Status Change 	Developer changes to Final Submitted
June 30, 2023	Deadline for supervisors or IR to review plans, provide feedback, and approve plans.	Supervisor changes to Final Accepted
July / August 2023	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. Plan developers may use the Annual Work Plan Template to begin planning for AY2324.	
Mid-August 2023	Database opens for AY2324 work plans.	

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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 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 or supervisor. Select the plan you wish to edit from the drop-down menu.
 - a. For more about each section, see *Completing the Plans*, below.
 - 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. If you decide not to continue work on these goals, please make a note in the Narrative section.
5. Complete the required areas for each phase of the work plans (see "*Completing the Plans*, below).
6. Submitted plans will be reviewed by a supervisor or the Institutional Researcher (IR). Supervisors are encouraged to provide constructive feedback and change the plan status to Accepted when all work on the plan is complete.
 - a. If your plan does not have a supervisor under Plan Details, the IR will review your plan.

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

Want to save a copy of your plan or share it with your department?

Select **View Plan Report for exporting** at the top of the Plan Details section. First, choose your area on the right side of the screen, scroll all the way down below the Area ID section to select the desired year.

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COMPLETING THE PLANS

For each phase of the work plans (initial, mid-year, submitted), you will only see the sections that have already been completed or the required sections for that phase. You will not see sections that will be completed in a later 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 3 and 7 goals.
 - i. To add a new goal, select [Add Goal #](#) from the **Select Plan Goal** menu.
 - ii. You can delete a goal by clicking the **Delete this Goal** button at the bottom of the goal.
 - b. **Guiding Principle & Defining Characteristic:** You must first select a guiding principle in order to 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. **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..
 - d. **Planned Term Completion:** Select the term you expect to complete the action item(s).
 - e. **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](#)
 - f. **Indicator(s):** Describe what successful completion of the action items look like. These may also be considered outcomes or anticipated results. Effective indicators are measurable. Examples include such with a count (number of students), percent change (increase by 5%), publication of a document, etc.
 - g. **Save Goal.**
3. If any program review recommendations have been assigned to your area, you will see an additional section below Goal Status, titled **Assigned Recommendation(s)**.

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- a. If the goal supports a recommendation, select the relevant recommendation.
 - b. The **Connection to Recommendation** box will display. Briefly describe how the action item(s) support(s) the recommendation.
 - c. **Save Recommendation Work.**
 - d. **Save Goal.**
4. Above the Plan Details section, change the plan status to Initial Submitted and click **Save Plan Status**.
- a. If you have not completed any required sections, the plan status will automatically change to Initial Issues and 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 already been accomplished, you have started the work, or something has caused you to change your original plan.
 - b. **Goal Status:** You are have the option to update your goal status at this point. See Final Plans for more information about the goal status.
 - c. **Save Goal.**
3. Above the Plan Details section, change the plan status to Mid-Year Submitted and click **Save Plan Status**.
 - a. If you have not completed any required sections, the plan status will automatically change to Mid-Year Issues and 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:** Provide a brief summary of spending activities for the year, especially as they relate to the work plan. Compare 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. In short, document how you have demonstrated good stewardship of your allocated resources.
 - 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:

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- a. **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.
- 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. 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.
- c. **Goal Status**
 - Completed [term]: Action item(s) have been completed. This goal will not appear in future work plans.
 - Not completed: Actions item(s) have not been started/completed, with no future plans to complete them.
 - Ongoing: The same completed action item(s) will continue to be carried out, with no new work to be done. You may choose to keep them for another year, but it is not expected.
 - In Progress: Action item(s) started, but not completed – more work needs to be done in order to mark this goal complete. These action items will automatically be displayed in the database next year.
 - Deferred: Action item(s) not started, planned to complete in the next year. These action items will automatically be displayed in the database next year.

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 on any parts of the plan. Once they are satisfied with the plan, they should change the plan status to Accepted and save it.

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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 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.