

# Annual Plans

AY 2023-24

Each program, department, and committee on campus is responsible for completing an annual plan. The goal of the plan is to identify at least 3 goals for the year, align the work to the current [strategic plan](#), describe the actions that will be taken, and establish indicators for success. At the end of the year, plan developers reflect on the results of the actions and outline future actions for continuous improvement. The IDEA Committee reviews the plans to develop an understanding of progress toward mission fulfillment as it relates to the strategic plan.

Find all annual plans and the IDEA Committee review of the plans on the [Annual Plans Dashboard](#).

## Summary of Plans

### Initial Plans

There were few changes to work plans this year. Administrative Affairs was renamed to Operations and Business Office was renamed Fiscal Services to reflect a change in organizational structure. An area was added under General Education to support mapping of learning outcomes and course organization for the Education courses, and there will also be a benefit for this area to create work plans. Finally, in response to a program review recommendation, Metals Technology now completes annual plans. Global Initiatives is no longer included in work plans.

Guiding Principle	DC	2324	2223	Grand Total
Effectiveness	EF-1	7	6	13
	EF-2	11	20	31
	EF-3	15	18	33
	EF-4	7	12	19
Stewardship	ST-1	20	17	37
	ST-2	13	14	27
	ST-3	18	8	26
	ST-4	15	8	23
Impact	IM-1	21	19	40
	IM-2	12	13	25
	IM-3	9	11	20
	IM-4	13	11	24
	IM-5	9	11	20
Equity	EQ-1	11	5	16
	EQ-2	1	4	5
	EQ-3		3	3
	EQ-4	11	9	20
<b>Grand Total</b>		<b>193</b>	<b>189</b>	<b>382</b>

The average number of goals per plan remains the same as the last two years at 3.6. Even though areas could now write up to seven goals, only three areas wrote more than five.

Distribution of goals changed slightly from the previous year and reflects the Dean’s Cabinet’s selection of stewardship as the priority guiding principle for the year. A 10% increase in goals aligned with stewardship is complemented by a 7% decrease in goals supporting effectiveness and a 2% decrease in goals aligned with impact. The amount of goals aligned to equity increased by 1% this year over last year.

Each work plan goal is also aligned to a defining characteristic under the selected guiding principle. It is encouraging to see that the distribution is not heavily biased toward any one characteristic, though it is far from even, with a low of 0 goals aligned with EQ-3 and a high of 21 aligned with IM-1.

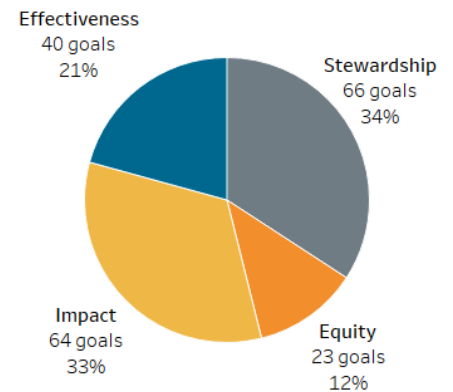


Figure 1. AY 2023-24 Goals by Guiding Principle.

### Final Plans

There was a slight re-alignment of goals following the initial IDEA Committee review, resulting in a decrease of goals aligned with EQ-2 and no goals aligning with EQ-3 (Demonstrate a shared commitment to promoting equity in all areas of campus operations). Discussions with committee members and a handful of plan developers indicate many areas struggle to align their work to this defining characteristic, as they do not feel their work reaches *all* areas of campus. This feedback will be considered if the plan is modified for the 2022-2027 period, or once the plan is revisited for 2027.

## Final Goal Status

For the second year of the strategic plan, slightly more than half of all goals were completed within the academic year. The “Ongoing” status was eliminated this year, as it was used inconsistently across departments. IDEA expected to see more completed and in progress goals as a result, and both increased by 4-5% over AY 2022-23. There was also a 1-2% increase in goals that have been deferred or not completed at all.

Overall positive progress dropped slightly, from 85% to 83%. Goals aligned with Stewardship saw below-average completion and positive progress. Goals aligned with both Stewardship and Equity experienced below-average completion rates, as well. Following discussions with Cabinet, IDEA Committee will begin reviewing goals that have not been completed in an academic year to categorize the reasons, and identify trends. Cabinet will then evaluate the reasons and identify possible strategies to support goal completion.

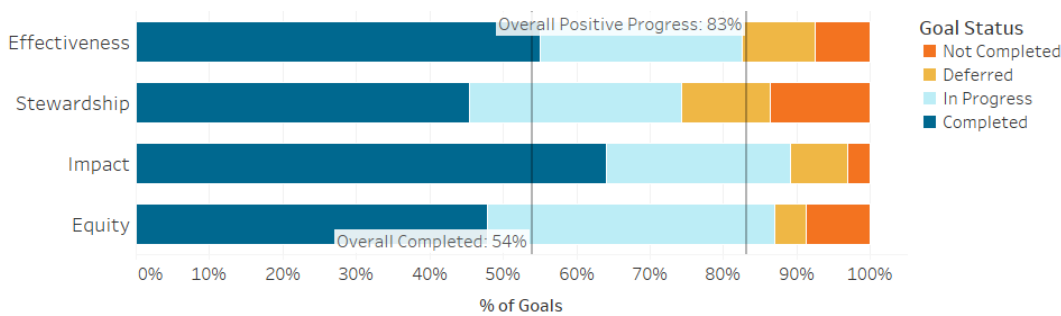


Figure 3. AY 2023-24 Final Goal Status by Guiding Principle

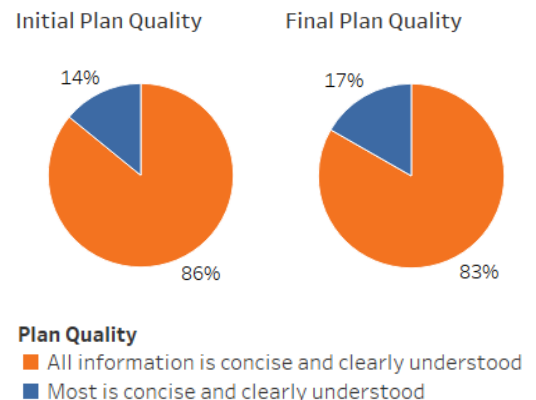
## IDEA Committee Review

After receiving supervisor approval, each work plan is reviewed by a member of the IDEA Committee according to the following criteria:

- Overall clarity and completeness
- Alignment of action items to strategic plan
- Quality of goals (according to SMART criteria: specific, measurable, achievable, relevant, and time-bound)
- Evidence of sound analysis and commitment to continuous improvement in the:
  - Mid-year narrative, final narrative, and final budget narrative
  - Mid-year update, results, and future actions

## Overall Plan Quality

For the most part, initial and final plans continue to be concise and clearly understood. Overall quality has increased since last year, which is reassuring to see after a dip in AY 2022-23. This year, no plans were marked as having a significant amount of information that was unclear at either the beginning or end of the process. Additionally, there was a 15% increase over last year in the number of initial plans (10% increase in final plans) where all information is concise and clearly understood. The available resources, training, and committee feedback continue to be useful tools to support plan developers, both new and experienced.

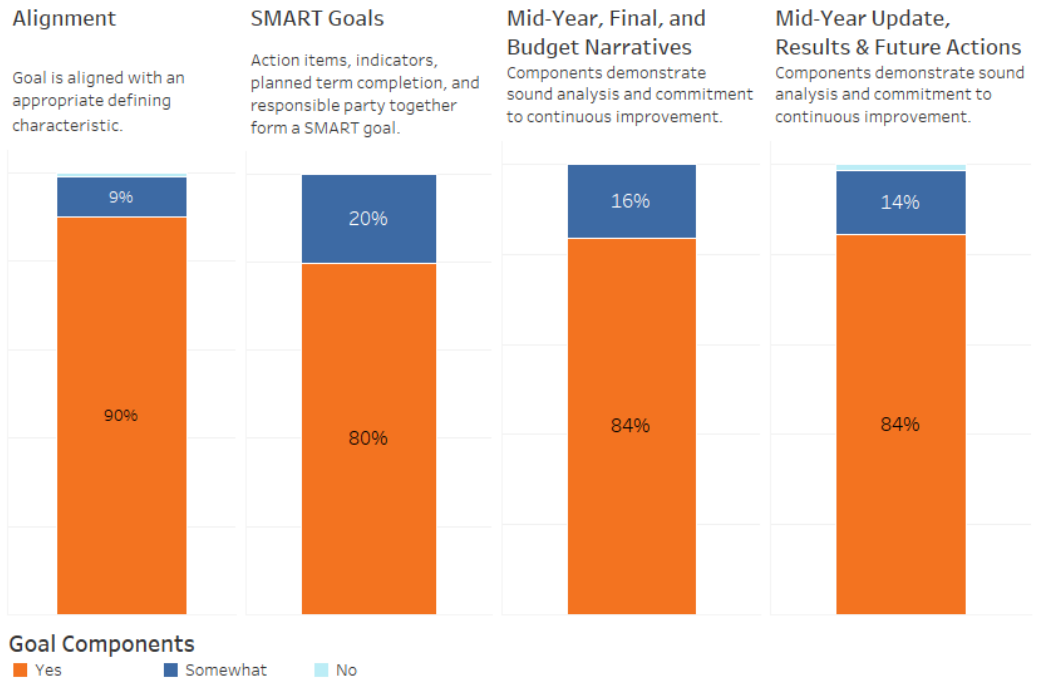


## Evaluation of Plan Components

The committee is satisfied with the alignment of goals and the quality of the goal components. The review was modified slightly this year to include the indicators in the SMART goal evaluation, which brought down the percent of goals fully meeting this criteria by 6%. The majority of feedback was related to creating more measurable indicators, which is where goals typically scored the lowest on the previous review form.

An optional SMART goal writing workshop was held at the beginning of the

academic year. Just over half of the work plan developers and editors attended. Although there was positive feedback from participants and their supervisors, it did not appear to have any measurable impact on initial goal quality. Mid-year and final goal quality did see improvements. IDEA will continue identifying strategies for promoting strong work plans and writing effective SMART goals.



## Annual Plan Examples

The following goals have been identified as good examples of SMART goals. These goals can be viewed in the [Annual Plans Dashboard](#) which features additional charts, the full text of all annual plans, and filters to explore the data in a variety of ways.

Area	Goal #	Area	Goal #
<b>Cosmetology</b>	1, 2, 3	<b>IR &amp; Effectiveness</b>	1, 2
<b>Education</b>	1	<b>Library Learning Hub</b>	3
<b>Facilities Department</b>	3	<b>Marketing, Comms, &amp; Alumni Relations</b>	1, 2
<b>Fiscal Services</b>	1, 2, 3	<b>Natural Science</b>	1
<b>Graduation Committee</b>	1	<b>Operations</b>	2, 3
<b>Human Resources</b>	1, 3	<b>Oral Communication</b>	1
<b>IDEA Committee</b>		<b>Retail Services</b>	1, 3
<b>IT &amp; Programming</b>	1, 2, 3, 6	<b>Staff Senate</b>	2

## Notable Work to Support the Strategic Plan

The following completed goals are just a sampling of the hard work being carried out across campus in support of the strategic plan.

Defining Char.	Area	Goal
EF-2	CNC Machining	Created two practical lab exams to measure students' ability to perform tasks on the milling machines and lathes to industry standards
EF-3	Oral Communication	Utilized enrollment and student outcome data to identify ideal days/times and course modalities for students needing to take COMX courses. Enrollment caps increased, hyflex courses were added, and scheduling conflicts with other Gen Ed courses were reduced.
EF-4	Montana 10	Advising audits helped students in the Montana 10 program achieve high rates of gateway math and writing course completion in their first year.
ST-1	Budget Management Team	Increased understanding of fee pots, including current and historical revenues and expenses, and appropriate uses for each.
ST-3	Operations	Developed a sound and plausible Long-Range Building Plan to support leadership in understanding the current state of HC facilities and opportunities and priorities for improvement.
ST-4	Accessibility Services, Enrollment, Facilities, Faculty Senate, Fine Arts, IT & Programming, Mathematics, Montana 10, the Professional Development Committee, and the Safety Committee all documented participation in or provision of professional development for the growth of employees and improvements in department operations.	
IM-1	Community Education Center & IWMP	Developed and offered a month-long welding training in partnership with the Department of Corrections. The curriculum will be utilized in similar programs across the state.
IM-2	Social Psychological Sciences	Public health transfer pathway to UM completed, and a public health transfer pathway to Carroll College is in the works.
IM-3	General Education	Career panels and round tables were offered for students to learn from professionals working in fields related to each meta-major at the college.
IM-5	Nursing	A mentoring program was established to encourage senior students to share their experiences and expertise with newer students.
EQ-1	CTE and Perkins	Events to recognize, support, and build community among women in the skilled trades programs were held, with a longer-term goal of developing a club.
EQ-2	Natural Science	Presentations and hands-on activities with area rural schools showed students the science pathways available to them at Helena College.
EQ-4	TRIO SSS	Staff and faculty established a work group focused on campus accessibility--specifically 508 compliance. The group has transitioned to an institutional committee.