



# **2022-2027 STRATEGIC PLAN & MISSION FULFILLMENT YEAR 1 REPORT**

## **MISSION**

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

## **VISION**

Helena College aspires to empower our students through impactful, affordable, lifelong education that is responsive to the needs of our community in ways that are enriching, collaborative, and equitable.

## **GUIDING PRINCIPLES**

EFFECTIVENESS • STEWARDSHIP • IMPACT • EQUITY

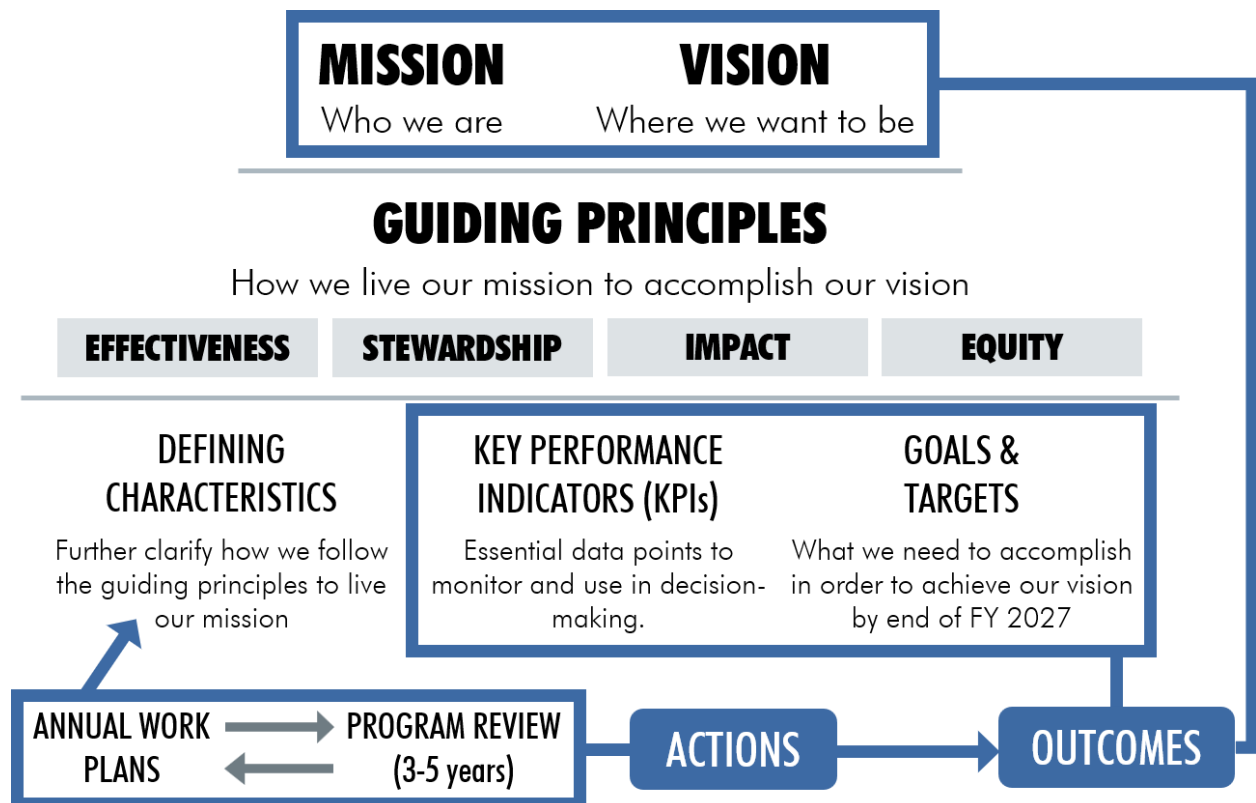
Prepared by Jessie Pate, Director of Institutional Research & Effectiveness  
on behalf of the Institutional Development, Effectiveness, and Accreditation Committee  
January 2024

## DETERMINATION OF MISSION FULFILLMENT

Helena College implemented its current framework for strategic planning and assessment of mission fulfillment following the acceptance of its [Year One Self-Evaluation Report](#) by the Northwest Commission on Colleges and Universities (NWCCU) in July 2018. The two-fold framework utilized under the 2018-2022 strategic plan has been adapted for the 2022-2027 plan, and a third measure has been added to better assess progress toward strategic goal targets. The three components of mission fulfillment are:

1. Alignment of annual work plan goals to defining characteristics of each of the four guiding principles, and general positive progress at the end of each year
2. Systematic analysis of key performance indicators
3. Annual evaluation of progress toward strategic goal targets

The Institutional Development, Effectiveness, and Accreditation (IDEA) Committee is responsible for monitoring, evaluating, and reporting on these metrics, as well as sharing recommendations for improvement with the Dean’s Cabinet and keeping the entire campus community apprised of progress. IDEA will assess mission fulfillment annually and present its findings in the form of a mission fulfillment report.



# ANNUAL WORK PLANS

Annual work plans were implemented in the 2018-19 academic year to track departmental contributions to the goals identified in the college’s 2018-2022 strategic plan. The plans have proven to be helpful not only for capturing the important work done across campus, but also as a tool that individual departments can use to plan their years and assess their effectiveness. The 2022-2027 strategic plan features guiding principles and defining characteristics of those principles, which serve as the pillars of how we live our mission to achieve our vision. They provide an ideal framework for demonstrating how each area of campus works to advance the college’s mission and goals.

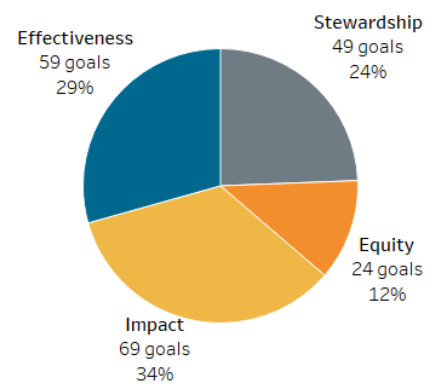
At the beginning of every academic year, plan developers are asked to set at least three goals for their areas and describe the actions to be taken, indicators of success, and responsible parties for each. They are asked to align each goal to a defining characteristic of one of the four guiding principles. Each year, the IDEA Committee reviews the plans to evaluate alignment, quality, and achievement. Changes are implemented to the process as needed to improve usability, plan quality, and reporting capabilities

## Alignment to Strategic Plan

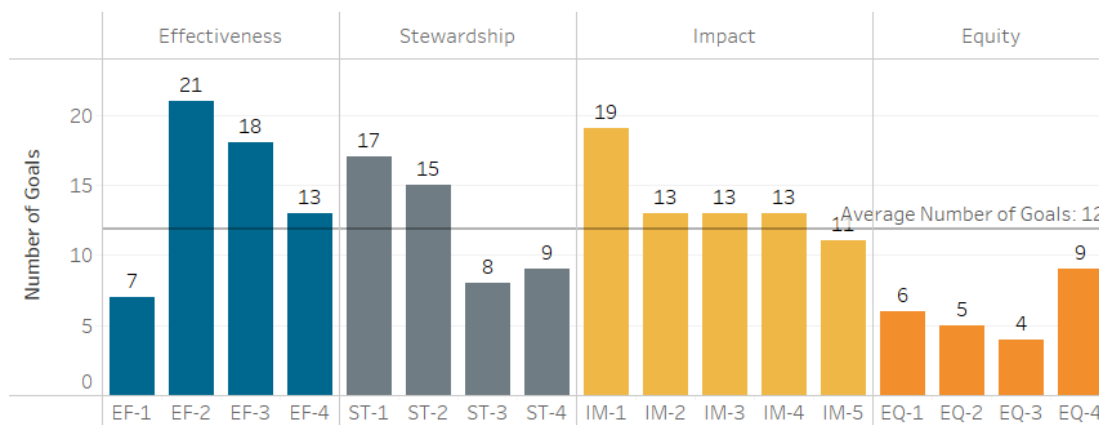
As this was the first year of the new strategic plan, the Dean’s Cabinet chose not to set any priority areas of focus, so that natural alignment with the new plan could be understood. Just over a third of the goals (34%) aligned with an Impact defining characteristic, while slightly less than one third (29%) aligned with Effectiveness. Almost a quarter of the goals aligned to a Stewardship defining characteristic, and only 12% of goals aligned with Equity. Although the distribution at the guiding principle or defining characteristic level is not perfectly balanced, each defining characteristic was supported by at least four goals. The distribution affirms the success of the strategic planning team in creating a plan that reflects the work of all areas of campus.

For each the next four years of the strategic plan, the Dean’s Cabinet will select one guiding principle to serve as the main theme for the year, encouraging but not requiring all areas to set at least one goal aligned with a defining characteristic in the featured guiding principle.

Goals by Guiding Principle  
2022-23



Goals by Defining Characteristic  
2022-23

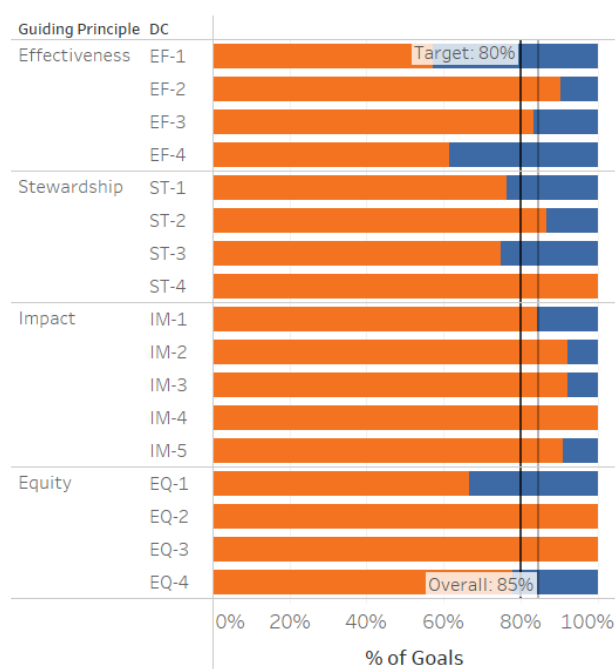


## Final Goal Status

Although balanced alignment of work to the college’s mission and general goal-setting are the primary focus of annual work plans, the IDEA Committee acknowledges that progress toward identified goals should be monitored if they are to be used as an indicator of mission fulfillment and institutional effectiveness. To that end, the Committee set a target for at least 80% of goals each year to show some sort of positive progress (status of completed, in progress, or ongoing).

### Goal Progress by Defining Characteristic

2022-23



#### Simplified Goal Status

- Deferred or Not Completed
- Completed, In Progress, or Ongoing

The greatest number of goals with positive progress and goals completed occurred in the Impact guiding principle, which also saw greater than 80% positive progress for goals aligned with each defining characteristic. It is reassuring to see broad institutional commitment and success in this area, as it captures much of our direct work with students and the community, the heart of our mission.

The Equity guiding principle saw the fewest number of goals aligned to it, but 84% of those goals saw positive progress by the end of the year. These goals did see the lowest percent to be fully completed, indicating that equity work on campus may operate on a longer timeline than other types of work.

With 85% of all goals seeing some positive progress in the last year, the IDEA Committee can affirm that we are broadly successfully fulfilling our mission.

Evaluation of final goal status by guiding principle and defining characteristic shows areas of strength and areas where more support may be needed to increase successful completion of goals.

Goals aligned to Effectiveness did not meet the overall target of 80% of goals showing positive progress, and only half of the defining characteristics exceeded that target. Goals aligned to EF-1 and EF-4 saw the least progress of all defining characteristics. More support may be needed in this area to ensure successful completion of these goals.

Goals aligned to Stewardship met the 80% positive progress target. Goals aligned with ST-1 and ST-3 did not meet the target, but came within 5%, indicating work in this area is generally progressing to satisfaction.

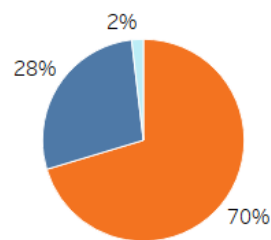
Guiding Principles	Number of Goals	Percent Positive Progress	Percent Complete
Effectiveness	59	78%	51%
Stewardship	49	83%	50%
Impact	69	91%	52%
Equity	24	84%	43%
<b>Total</b>	<b>201</b>	<b>85%</b>	<b>49%</b>

## Quality of Work Plans

IDEA Committee evaluates final and initial work plans every year, both for overall clarity of the content, and for quality of action items, indicators, results, and future actions. Plan quality has remained steady, with approximately 70% of plans being concise and clearly understood.

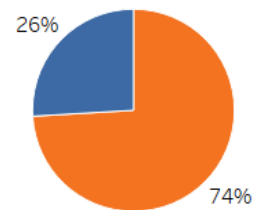
Plan developers continue to demonstrate understanding of how their work aligns to the strategic plan, as 88% of goals were aligned with an appropriate defining characteristic, continuing a trend from the previous two years. Training in writing SMART (specific, measurable, achievable, relevant, and timely) goals continues to be effective, as 76% of goals meet this criteria. Written comments from the IDEA Committee reveal that identifying measurable indicators continues to be the most challenging part. Finally, the mid-year updates, results, and future actions have continued to improve, as AY 2022-23 work plan goals saw a record high of 84% demonstrating sound analysis and a commitment to continuous improvement.

Initial Plan Quality

**Plan Quality**

- All information entered is concise and clearly understood
- Most information entered is concise and clearly understood
- A significant amount of information entered is not concise and clearly understood

Final Plan Quality



## Summary

Annual work plans continue to be a valuable tool to demonstrate how every area on campus can align their work to the strategic plan, and to monitor the outcomes of that work. IDEA Committee is satisfied with the level of mission fulfillment demonstrated by annual work plans, as evidenced by the following:

- All defining characteristics had at least four work plan goals aligned to it, with broad distribution of goals across all guiding principles and defining characteristics
- 85% of goals saw positive progress in the academic year (exceeding the target of 80%)
- At least 70% of work plans fully meet the indicators of quality set by the IDEA Committee

## KEY PERFORMANCE INDICATORS

Each guiding principle has between two and eight key performance indicators (KPIs), which are metrics that are essential for the college to monitor, but do not represent major strategic goals for the next five years. Many of the 28 metrics were core theme indicators of achievement under the 2018-2022 strategic plan, and each has been carefully reviewed for relevance and ability to measure, whether they were part of the former strategic plan or new for 2022.

Each indicator of achievement has a **baseline** (rolling three-year average) and **target** by which **current performance** is measured. Performance on each indicator of achievement was scored using the following criteria:

- 2: Met or exceeded target
- 1: Performance within 90% of target
- 0: Performance not within 90% of target

The IDEA Committee defined an acceptable threshold for mission fulfillment to be 75% of all key performance indicators (KPIs) exceeding, meeting, or coming within 90% of their targets. KPIs that do not yet have a target defined will be excluded from the calculation. The results for each guiding principle and the associated KPIs are summarized below.

### Effectiveness

The college has been quite successful in meeting or exceeding all of the KPIs that are currently defined and have targets set. Areas for improvement are gateway writing completion rates, for both full-time students (percent is within 90% of target) and part-time students (this continues to see the lowest completion rates of the four). Credit accumulation should also be targeted for improvement. Learning outcomes assessment continues to challenge the committee, as it has taken time for there to be enough data in the college's assessment database to understand what can be measured and what a meaningful target could be. It is hoped that metrics will be in place by AY 2023-24.

Indicator	Metric	2022 Baseline (3-year average)	2027 Target	90% Threshold	AY 2022-23	Score
EF-1a	<b>Gateway completion – Full-time math</b> Percentage of <u>full-time</u> entering students completing gateway <u>math</u> within their first year	68.3%	70%	63%	71.5% Fall 2022 cohort	2
EF-1b	<b>Gateway completion – Part-time math</b> Percentage of part-time entering students completing gateway math within their first year	42.4%	46%	41.4%	63.6% Fall 2022 cohort	2
EF-1c	<b>Gateway completion – Full-time writing</b> Percentage of full-time entering students completing gateway writing within their first year	52.9%	55%	49.5%	50.8% Fall 2022 cohort	1
EF-1d	<b>Gateway completion – part-time writing</b> Percentage of part-time entering students completing gateway writing within their first year	34.0%	35%	31.5%	34.8% Fall 2022 cohort	2

Indicator	Metric	2022 Baseline (3-year average)	2027 Target	90% Threshold	AY 2022-23	Score
EF-2	<b>Course success rates</b> Students successfully completing courses each semester across all modes of delivery	83.7%	75%	67.5%	84.5% AY 2022-23	2
EF-3	<b>Credit accumulation</b> Percentage of first-time full-time freshmen completing 24 or more credit hours within their first academic year (fall and spring) and first-time part-time freshmen completing 12 or more credit hours within their first academic year	51.2%	51.7% 1% growth over rolling 3-year average	46.6%	51.5% Fall 2022 cohort	1
EF-4	<b>Credential learning outcomes</b> Credential learning outcomes successfully achievement by students each academic year	TBD	TBD	TBD	n/a	n/a
EF-5	<b>Institutional competencies</b> Students demonstrating competency in information literacy, technology literacy, and diversity outcomes	TBD	TBD	TBD	n/a	n/a
EF-6	<b>Completion of non-credit credentials</b> Successful completion rate for credential-granting non-credit programs	80.5%	81.3% 1% growth over rolling 3-year average	73.1%	94.2% AY 2022-23	2
<b>Effectiveness Overall</b>		<b>Maximum 14</b>	<b>Target 7</b>			<b>12</b>

## Stewardship

Because four of the seven KPIs in this guiding principle are tied to a survey that is administered every three years, fewer than half of the KPIs will be evaluated annually. The IDEA Committee, Dean’s Cabinet, and Budget Management Team are all discussing possible metrics for ST-3 to help the college quantify the return on investment in professional development.

Indicator	Metric	2022 Baseline	2025 Target	90% Threshold	AY 2022-23	Score
ST-1	<b>Professional development funding</b> Percent of fiscal year operating budget allocated to professional development	4.6%	5%	4.5%	4.9% FY 2022-23 Estimates from budget managers	1
ST-2	<b>Professional development activities</b> Number of permanent employees recording at least one PD activity in Vector annually	46%	90%	81%	74% AY 2022-23	0

Indicator	Metric	2022 Baseline	2025 Target	90% Threshold	AY 2022-23	Score
ST-3	<b>Professional development outcomes/ROI</b> Departmental tracking/reporting of outcomes of PD activities	TBD	TBD	TBD	n/a	n/a
ST-4	<b>College Employee Satisfaction Survey (CESS)</b> Overall satisfaction with employment at HC	4.17	4.00 <i>Mean satisfaction score at or above</i>	3.60	n/a	n/a
ST-4a	<b>CESS Q1.15 Mean Satisfaction</b> There are effective lines of communication between departments.	3.06	3.21	2.89	n/a	n/a
ST-4b	<b>CESS Q1.31 Mean Satisfaction</b> This institution does a good job of retaining its employees.	3.02	3.17	2.85	n/a	n/a
ST-4c	<b>CESS Q4.14 Mean Satisfaction</b> I am paid fairly for the work I do.	3.33	3.50	3.15	n/a	n/a
<b>Stewardship Overall</b>		<b>Maximum 4</b>	<b>Target 2</b>			<b>1</b>

## Impact

Performance on these indicators is more than satisfactory. Dual enrollment student numbers continue to grow as a result of the college's commitment to reaching this population. Although transfer rates did not meet the target, the students who do transfer are performing well at their four-year institutions.

Indicator	Metric	2022 Baseline	2025 Target	90% Threshold	AY 2022-23	Score
IM-1a	<b>Dual enrollment</b> Fall unduplicated headcount + spring unduplicated headcount of dual enrollment students	1,012	1,022 1% growth over rolling 3-year average	920	<b>1,158</b> AY 2022-23	<b>2</b>
IM-1b	<b>Early college enrollment</b> Annual unduplicated number of high school students taking any class as early college credit	91	94 3% growth over rolling 3-year average	85	<b>154</b> AY 2022-23	<b>2</b>
IM-2	<b>150% graduation rate</b> Percent of all entering students that graduate in 150% normal time to completion	33.3%	32%	28.8%	<b>31.9%</b> Fall 2020 Cohort	<b>1</b>
IM-3	<b>150% transfer rate</b> Percentage of entering AA/AS students transferring within 3 years	35%	30%	27%	<b>24.5%</b> Fall 2020 Cohort	<b>0</b>
IM-4	<b>Transfer success rate</b> Percentage of transfer students in good academic standing (2.0 or better) after first semester following transfer to a 4-year MUS institution	87%	85%	77%	<b>96%</b>	<b>2</b>



Indicator	Metric	2022 Baseline	2025 Target	90% Threshold	AY 2022-23	Score
IM-5	<b>Transfer GPA</b> Median first-semester GPA of students following transfer to a 4-year MUS institution	3.50	3.30	2.97	3.39	2
IM-6	<b>Professional license and certification pass rates</b> Percentage of students successfully passing professional licensing exams and certifications	95%	90%	81%	97.5% AY 2022-23	2
IM-7	<b>Employment rates</b> Students completing career-technical education credentials who are employed in Montana 1 year following graduation	82.9%	85%	76.5%	83.9% Students earning degree/cert in 2020	1
IM-8a	<b>CCSSE Benchmark Scores</b> % of benchmark scores equal to or higher than standardized cohort benchmark of 50	60% 2022: 3 of 5 benchmark scores	100%	90%	n/a Next survey spring 2025	n/a
IM-8b	<b>SENSE Benchmark Scores</b> % of benchmark scores equal to or higher than standardized cohort benchmark of 50	50% 2019: 3 of 6 benchmark scores	100%	90%	83% Next survey spring 2025	0
<b>Impact Overall</b>		<b>Maximum 18</b>	<b>Target 9</b>			<b>12</b>

## Equity

It will be a priority in the spring of 2024 to set targets for these metrics.

Indicator	Metric	2022 Baseline	2025 Target	90% Threshold	Current	Score
EQ-1	<b>Diversity, equity, and inclusion-focused professional development</b>	TBD	TBD	TBD	n/a	n/a
EQ-2	<b>Campus Climate Surveys</b>	TBD	TBD	TBD	n/a	n/a
<b>Equity Overall</b>		<b>Maximum 0</b>	<b>Target 0</b>			<b>0</b>

## Summary

For the 2022-23 academic year, 23 of the 28 key performance indicators have been defined and assigned measurable targets, and five of those were not measured this year (all are from institutional surveys, which are administered on a three-year rotation), meaning mission fulfillment would be measured based on the success of 18 KPIs, with a target overall score of 13.

Guiding Principle	Maximum Score	Target Score	No Metric Available	AY 2022-23 Score
Effectiveness	14	7	2	12
Stewardship	4	2	1	1

Impact	18	9	1	12
Equity	0	0	2	0
Overall	36	18	6	24

The overall score of 24 would indicate that the college **is meeting mission fulfillment according to its key performance indicators**, though a closer evaluation reveals success in only two of the four guiding principles.

The key performance indicators that did not meet the targets for mission fulfillment should be priority areas of focus for the campus in the next year, and those with a score of “1” should also be viewed as opportunities for improvement:

As IDEA Committee completes another year of measuring the success of key performance indicators as a part of mission fulfillment, the group can confidently say this process is generally effective. The following suggestions for improvement to the process have been identified:

- The 90% threshold may not be appropriate for some metrics. IDEA should consider setting an acceptable range for each KPI based on unique factors impacting each metric.
- The committee should prioritize establishing metrics and target for the five KPIs that have not been finalized (EF-4, EF-5, ST-3, EQ-1, and EQ-2).

## PROGRESS TOWARD STRATEGIC GOALS

Eight strategic goals have been set to be accomplished by AY 2026-27, ranging from one to three under each guiding principle. These goals represent key areas of focus for the college as it looks to fulfill its mission and accomplish its vision. In writing the 2022-2027 strategic plan, the steering team and IDEA Committee intentionally crafted specific and meaningful strategic goals with realistic but ambitious measurable targets. Because of this, the college is able to intentionally monitor progress toward the goals and outline strategies for accomplishing them.

In the summer of 2022, the Dean's Cabinet convened to review the goals, establish primary responsible parties, and set initial timelines and strategies for each goal and target. The Cabinet plans to discuss progress toward each goal at least once an academic year. The tables below summarize the discussions in May 2023 and January 2024.

### Effectiveness

#### Strategic Goal EF-1

Streamline and align assessment and data reporting practices to support decision-making and planning.

#### TARGET

A centralized repository will be developed, and employees will receive training and educational materials to support the use of the repository. The repository will contain the following:

1. Assessment and mapping of course learning outcomes, credential learning outcomes, and institutional competencies
2. Annual work plans and program reviews
3. Key performance indicators for strategic planning, strategic enrollment planning, and other important activities
4. Commonly-requested institutional data
5. Dictionary of key terms and documentation of processes

#### PROGRESS TO DATE

- The Institutional Researcher has completed training in the use of Tableau, which is the platform that will be used to create the dashboards. This goal will receive more attention following Year 7 accreditation activities with NWCCU
- The assessment team is currently working on the most effective ways to pull and report learning outcomes assessment data.
- Annual work plan dashboard created for AY 2022-23 plans and updated with initial work plan data from AY 2023-24.
- Some dashboards have been created in response to ad hoc data requests, but no work has been done toward institution-wide dashboards.
- Existing reports (published in Excel and saved to shared drives and all-campus team in Microsoft Teams) contain a data dictionary and most contain information about source data.

### Stewardship

#### Strategic Goal ST-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 asses.

## TARGETS AND PROGRESS TO DATE

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 begun drafting a new contribution margin model for academic programs and will pilot it with three programs in FY24.
2. Each area will include one annual work plan goal related to creation of a replacement/renewal schedule for their assets in AY2223.
  - a. Preliminary inventory work began. Target may transition to establishment of a 10-year master plan incorporating departmental inventories and replacement/renewal schedules. Executive Director of Fiscal Services is planning a three-year process for programs to start with a three-year plan, then build a five-year and, finally, and ten-year plan by AY 2026-27.
3. Increase staff/faculty satisfaction with departmental budget process by 10%.
  - a. **CESS\* Q4.11:** My department has the budget needed to do its job well.  
Baseline (2021): 3.54  
Target: 3.89
    - College Employee Satisfaction Survey will next be administered in fall 2024 and 2027
4. Increase employee satisfaction pertaining to planning by 15%.
  - a. **CESS Q1.7:** This institution involves its employees in planning for the future.  
Baseline (2021): 3.70  
Target: 4.25
  - b. **CESS Q1.8:** This institution plans carefully.  
Baseline (2021): 3.42  
Target: 3.93
  - c. **CESS Q1.13:** This institution makes sufficient budgetary resources available to achieve important objectives.  
Baseline (2021): 3.42  
Target: 3.93
    - College Employee Satisfaction Survey will next be administered in fall 2024 and 2027

## Strategic Goal ST-2

Conduct targeted trainings to increase employee understanding of stewardship.

## TARGETS AND PROGRESS TO DATE

1. Expectations for responsible management of resources will be articulated for all employees, consistent with their institutional role.
  - Plans to re-structure and re-focus Budget Management Team (BMT) will include this goal. A faculty representative has been added to the BMT, but the group has been unsuccessful in recruiting a staff member.
2. A series of trainings will be developed to educate employees about stewardship, fiscal responsibility, and expectations related to the new budget process.
  - Not started yet.
3. Increase employee satisfaction with teamwork/cooperation by 20%.
  - **CESS Q1.22:** There is a spirit of teamwork and cooperation at this institution.  
Baseline (2021): 3.42  
Target: 4.10
  - College Employee Satisfaction Survey will next be administered in fall 2024 and 2027

## Strategic Goal ST-3

Improve the return on investment in professional development activities.

### TARGETS AND PROGRESS TO DATE

1. Update the procedures for allocating all professional development funds to promote transparency and accountability.
  - a. The Professional Development Committee strives to improve transparency of their funds and how they are awarded, but some confusion remains about department professional development. The re-structured and re-focused Budget Management Team will be responsible for this.
2. Establish specific expectations for tracking and sharing outcomes of all professional development activities, regardless of funding source.
  - a. The spring 2024 State of the College meeting will include an opportunity for employees who received professional development funding to share what they learned, either in a short write-up or brief presentation. IDEA Committee has also suggested that employees could share outcomes of professional development in the Monday Morning Memo.
3. All departments will have at least one goal related to professional development in their annual work plans.
  - a. AY 2023-24 annual work plans include new fields for each area to document professional development goals at the beginning of the year and reflect on successfully completed PD activities at the end of the year.
4. Maintain satisfaction with professional development opportunities within 2%.
  - a. **CESS Q4.16:** I have adequate opportunities for training to improve my skills.  
Baseline (2021): 4.12  
Target: 4.04 – 4.20
  - b. **CESS Q4.17:** I have adequate opportunities for professional development.  
Baseline (2021): 4.13  
Target: 4.05 – 4.21
  - College Employee Satisfaction Survey will next be administered in fall 2024 and 2027.

## Impact

### Strategic Goal IM-1

Demonstrate campus-wide engagement with the community.

#### TARGETS

Targets remain to be established. Following a discussion with the Dean's Campus Advisory Council about significant areas and types of community engagement, the IDEA Committee has begun discussing potential targets. Conversations have been focused on data that may already be available and the type of data that would be valuable to collect. The committee wants to ensure data collected will be meaningful for measuring success of this goal without requiring a significant investment of time from employees tasked with gathering the data.

### Strategic Goal IM-2

Utilize academic pathways to increase enrollment, retention, and completion.

#### TARGETS AND PROGRESS TO DATE

1. Establish a method for tracking student pathways

- No consistent method established yet. Beginning in AY2425, applicants will be required to select a meta-major. The variety of pathways and frequency of changes to them will be difficult to code in SIS. Prioritizing coding of programs correctly. Reconsider this as a target following AY2324.
2. 80% of degree-seeking students will choose an academic pathway or meta-major before the end of their second semester.
    - Indirect evidence, such as advisor observations and number of course substitutions, indicate that students are choosing pathways. May be able to create custom CCSSE question. Also reconsider this target following AY2324.
  3. Increase average annual full-time equivalent (AAFTE) by 3% each year.

AAFTE	Baseline (AY 2021-22)	AY 2022-23	AY 2023-24	AY 2024-25	AY 2025-26	AY 2026-27
Target		679	694			
Actual	659	674				
Diff from Target		-0.7%				

4. Increase retention of all entering students by 1% each year.

Retention	Baseline (AY 2021-22)	AY 2022-23	AY 2023-24	AY 2024-25	AY 2025-26	AY 2026-27
Target		52.6%	60.9%			
Actual	52.1%	59.1%				
Diff from Target		6.5%				

5. Increase number of degrees and certificates awarded annually by 2% each year.

Degrees & Certificates	Baseline (AY 2021-22)	AY 2022-23	AY 2023-24	AY 2024-25	AY 2025-26	AY 2026-27
Target		215	249			
Actual	209	242				
Diff from Target		12.4%				

## Equity

### Strategic Goal EQ-1

Build institutional capacity for incorporating equity as a fundamental element of regular operational practice, decision-making, and planning.

#### TARGETS AND PROGRESS TO DATE

1. Provide all-campus training to establish a shared understanding of equity during AY 2022-23.
  - All full-time permanent employees were required to attend “Creating a Culture of Inclusion,” presented by Leadership Montana. Only participants who watched the recording were required to reflect on their experience. Need to measure baseline understanding of college, possibly ahead of next campus-wide related training or the next administration of the campus climate survey.

2. Identify new employee training and ongoing mandatory training for current employees to further develop diversity, equity, and inclusion competency.
  - This has not been done. Considering engaging campus in a conversation about what we are already doing to advance equity, or identify what needs to be prioritized or discussed. Plans for a subgroup of Cabinet to meet have not materialized.
3. Establish a Diversity, Equity, and Inclusion (DEI) Council in AY 2023-24.
  - This is an important gap that needs to be filled, but have been unable to identify best approach or support from outside organizations in accomplishing this. Plans to convene a group have not advanced.
4. DEI Council will develop a framework and provide support for all areas of campus to utilize in making decisions, planning, and providing services with an equity lens.
  - Pending Target 3.

## Strategic Goal EQ-2

Develop and implement strategies to disaggregate student and employee data to identify, monitor, and eliminate institutional barriers.

### TARGETS AND PROGRESS TO DATE

- Identify metrics and population groups to disaggregate.
  - Many metrics are already disaggregated in existing institutional reports, presentation could be improved. Plans to also include peer comparisons where possible.
- Evaluate disaggregated data to identify barriers to student success.
  - General Education faculty requested a report of course pass rates disaggregated by modality and student characteristics/populations. Perkins V also requires analysis of data disaggregated by federally-defined special populations.
- Develop strategies to address or eliminate barriers.
  - This is likely happening on a departmental level, but have not formalized a process for areas to report on those strategies outside of annual plan goal alignment to Equity defining characteristics.

## Summary

Satisfactory progress has been made for the first year of the strategic plan. Many of the goals have seen work started, with next steps and responsible parties defined. Especially reassuring is the first report of annual average FTE, retention rates, and number of degrees and certificates awarded, as they represent key aspects of institutional effectiveness and are the results of hard work by employees across the institution.

## CONCLUSION

Mission fulfillment is not an easy concept to measure. The IDEA Committee believes that its three-pronged approach effectively combines qualitative and quantitative data to understand how the college is performing. The actions outlined in the annual work plans have their own positive outcomes, but their success is also evident in the ability of the college to meet key performance targets and work collaboratively to accomplish the strategic goals.

The following observations lead the IDEA Committee to rate the college's work toward mission fulfillment in 2022-2027 as satisfactory:

- Annual Work Plans
  - All defining characteristics of the guiding principles had at least four work plan goals aligned to it, with broad distribution of goals across all guiding principles and defining characteristics
  - 85% of goals saw positive progress in the academic year (exceeding the target of 80%)
  - At least 70% of work plans fully meet the indicators of quality set by the IDEA Committee
- Key Performance Indicators
  - 23 of the 28 key performance indicators have been defined and assigned measurable targets. Five are only measured every three years, leaving 18 indicators to measure, for a target score of 13 out of 18 and a maximum of 36.
  - The college surpassed its target with a score of 24.
  - Strategies for improving analysis of KPI performance have been identified.
  - The five KPIs that do not have metrics or targets will be set by the end of AY 2023-24
- Strategic Goals
  - Many of the goals have seen work started, with next steps and responsible parties defined.
  - Essential student achievement metrics of annual average full-time equivalent, retention rates, and number of degrees and certificates awarded all came close to or exceeded first-year targets.



## APPENDIX A

### Selected Work Plan Goals by Guiding Principle and Defining Characteristic

#### Effectiveness

1. Systematically assess and advance the strategic enrollment plan to support the mission of the college
  - In response to recommendations from the strategic enrollment planning process that began in the spring of 2018, the **Orientation Committee** has been re-invigorated following a couple years of inactivity. The committee now features members from academic advising, financial aid, admissions, K-12 partnerships, and a faculty member. Following a successful spring orientation, the committee plans to evaluate successes and identify areas for improvement based on feedback from participants.
2. Demonstrate that students have learned requisite knowledge and skills relevant to their educational goals.
  - **CNC Machining** has been awarded the status of State of Montana HAAS Factory Authorized CNC Operator Certification Center, which allows students to test for certification on industry-standard equipment and software.
3. Apply research and assessment data to make evidence-based decisions regarding curriculum, instruction, programming, and resource allocation.
  - **General Education** has researched necessary investments and potential impacts to community and state workforce needs associated with the development of a new Certified Occupational Therapy Assistant program.
  - The **Math** faculty evaluated the impact of self-selection into four core math courses (as opposed to utilizing placement test scores and relying on pre-requisites). Pre-requisites have been removed from all four courses after pass rates were equal to or greater than pass rates prior to the implementation of self-selection.
  - WRIT104 and COMX106 were combined into one course to meet the communication requirements for trades programs, reducing the number of courses required for completion of the programs.
4. Utilize performance metrics for assessing institutional progress toward strategic goals.
  - **IDEA Committee** developed a weighted scoring system to identify regional and national peer institutions to be used in benchmarking performance data.

#### Stewardship

1. Foster a culture of organizational stewardship that promotes accountability and integrity.
  - The **Associated Students of Helena College** created a budgeting tool to promote fiscal responsibility among student government and student clubs.
2. Demonstrate fiscal responsibility in the procurement and allocation of resources in support of the mission and vision of the college.
  - The **IT Department** added two shared positions with the University of Montana-Western, enabling both institutions to increase IT and LMS support without the investment of two additional full-time employees on the part of either institution.
  - The **Safety Committee** utilized state funds to advance safety-related infrastructure and processes at the college, including the installation of lockdown buttons, a new security gate in the Welcome Center, and video surveillance across campus, as well as active shooter trainings, fire drills, and fire extinguisher training.
3. Utilize long-term planning for capital asset management, sustainability, and innovation in response to the needs of our students and communities.

- Many of the **trades programs** developed a new program fee structure to compliment **Perkins** funding in support of long-term planning for replacement of program equipment.
  - **Retail services** upgraded their credit card system to support increasingly-popular mobile payment options.
4. Leverage professional development to promote innovation and efficiency among all employees.
    - Administrative assistants in **Academic Affairs** worked together to standardize shared tasks or assign them to one individual and cross-train each other.
    - The **Professional Development Committee** hosted or recommended trainings in response to campus requests, including First Aid/CPR/AED, Mental Health First Aid, office technology, and promotion of available resources for additional training.

## Impact

1. Evaluate and respond to educational and workforce needs to cultivate mutually beneficial relationships.
  - The **Community Education Center** created customized training for the Montana Department of Transportation.
  - The **Dean's Cabinet** compiled a mailing list of key community partners and developed quarterly communications to maintain connections, bringing together advisory board members and contacts from other departments.
  - **Industrial Welding and Metal Fabrication** worked with Career Connections Coordination and advisory board members to build relationships with local businesses, resulting in classroom visits and industry-related summer and part-time employment for students.
2. Create and support academic pathways that align with strategic goals to promote seamless career transition or postsecondary transfer.
  - **Cosmetology** AAS curriculum was approved by Academic Standards and Curriculum Review Committee.
  - **Information Technology and Programming** began work to create Cloud DevOps AAS and IT Help Desk CAS.
  - **Psychology** department created an academic pathway for transfer to UM's public health bachelor's degree program, receiving approval for and developing two new courses.
3. Stimulate curiosity, critical thinking, and problem solving to promote student engagement and intentional self-discovery.
  - First-year seminar courses incorporated into all **General Education** degrees pathways for AY2324, including one section dedicated to students participating in **Montana 10**.
  - **Natural Science** faculty incorporated research and inquiry-based lab activities into their courses and connected a student to a paid internship position with a conservation agency.
  - The **Nursing** department created a dedication simulation lab to enhance the clinical experiences of nursing students. Three courses incorporated simulations into their curriculum.
4. Collaborate to build a culture of adaptability, inquiry, respect, and civic engagement that works toward the common good.
  - The **Automotive Technology** students held vehicle inspection days targeted to senior citizens and single parents in the community.
  - **Career Technical Education** and **General Education** departments have increased cross-division communication to align processes, share resources, and promote collaboration.

- **Oral Communication, Humanities, and Fine Arts** instructors attended each others' classes as observers or guest lecturers, providing valuable opportunities for feedback on classroom engagement and instruction.
5. Holistically support and empower students to attain their academic, career, and personal goals.
    - **Financial Aid** partnered with other campus departments and community organizations to provide financial literacy education.
    - The **Graduation Committee** updated their format to provide a more personalized experience for graduates and their families, creating opportunities for faculty to read the list of grads for their program.
    - **K-12 Partnerships** established a steady presence at East Helena High School, expanded dual credit course offerings, and hosted four students at the airport campus to shadow students in the program, resulting in two enrollments for the next academic year.
    - **TRIO-SSS** supported nearly all of their participants in creating a personal academic success plan, which helped them customize support, outreach, and programming for their students.

## Equity

1. Attract, retain, and support a diverse community of administrators, faculty, staff, and students.
  - **eLearning and Faculty Development** made improvements to new faculty onboarding, incorporating team-building activities into new faculty orientation, creating opportunities to connect with seasoned faculty, and creating a virtual team space for collaboration.
2. Build and utilize community partnerships to recognize and address the holistic needs of our diverse population to bridge equity gaps.
  - **Fine Arts** made changes to the HC Showcase art show to develop more community partners and reach more members of the community, including families at Bryant Elementary and the college Art Club.
3. Demonstrate a shared commitment to promoting equity in all areas of campus operations.
  - The **Associated Students of Helena College** converted all of their essential documents, applications, and student-facing materials to increase accessibility for students attending only online and students with visual disabilities.
  - **Admissions counselors** attended the Montana College Attainment Network conference, which featured sessions on increasing access to college and developing a college-going culture among.
4. Identify and eliminate institutional barriers that have prevented the full participation of underserved groups.
  - **Institutional Research** led workshops with staff and faculty to evaluate CCSSE survey data disaggregated by different student populations.
  - All **Montana 10** participants completed their FAFSA, part of efforts to increase financial literacy and identify different ways to pay for college.
  - A new OER (open educational resource) textbook was adopted for **SOCI 101** courses.
  - **Institutional Research** created dashboards featuring disaggregated student performance data for the **Perkins** grant coordinator and the **General Education** faculty.