Wilmette Institute

Institutional Effectiveness Plan

Data Tracking

2024-2025

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Introduction

Founded in 1995 by the National Spiritual Assembly of the United States, the Wilmette Institute began as an educational institution providing systematic training about the Bahá'í Faith. Initially offering on-site community courses, the Institute transitioned to correspondence-based and then fully online learning. The Institute's recent move towards offering its Social Transformation Certificate program marked a significant expansion, aligning its mission with broader educational objectives.

The certificate program is designed for graduate-level students or undergraduates in their junior or senior year. The program aims to equip participants with knowledge and skills for societal change applied through the lens of a Baha'i perspective, requiring students to complete any three courses in the program offered within two years of enrollment.

Institutional Mission and Vision

Mission

The mission of Wilmette Institute is to offer a quality academic non-degree certificate program and courses through online education in a Bahá'í approach to Social Transformation. Wilmette Institute offers distinctive learning experiences characterized by action and reflection that aim to raise capacity in learners from diverse populations. We seek to understand how a Bahá'í perspective, applied to prevalent discourses, helps build a more compassionate, just, and inclusive society.

Vision

The Wilmette Institute will offer a certificate for the non-degree-related educational program: **Social Transformation**. The academic program focuses on courses that present the Bahá'í perspective on pressing local and global social issues, including nonviolent social change, racial amity and justice, environmental ethics, and sustainable development. These courses seek to provide learners with opportunities for critical thinking and systems thinking about the root causes of social problems and provide a holistic perspective on social change that highlights the interconnectedness of issues to find lasting solutions. The courses offer scientific and spiritual approaches to sustainable social change for youth, young adults, and adults of all economic strata and backgrounds. Wilmette Institute opens opportunities for people to apply their knowledge at the grassroots for the betterment of the world.

Wilmette Institute will pursue partnerships with educational institutions interested in incorporating its courses into academic degrees. If, at some point, there are educational or vocational reasons to offer an undergraduate or graduate degree, its courses for university students and its partnerships will have prepared it well to do so. It will continue to offer extension courses as incubators for new credit courses and develop new courses in continuing education. The Institute seeks to be a major center for knowledge generation and dissemination related to the Bahá'í Faith through its academic program, extension courses, webinars, and online publishing.

Enrollment - Marketing & Admissions

Key Indicators for Annual Achievement

Below are the assessment instruments used to determine whether Wilmette Institute is achieving its mission through enrollment management and strategies.

Proportion of Students from Underrepresented Minority Populations

Our mission statement expresses our goal to offer quality academic programs that "aim to raise capacity in learners from diverse populations." Wilmette Institute is committed to spiritual transformation processes with material outcomes and is therefore motivated to connect with students from communities with intact spiritual worldviews and liberatory practices. People from intact spiritual worldviews often have darker skin, live in economically marginalized and politically disenfranchised areas, and are often underrepresented in graduate-level academic programs. Therefore, in alignment with its mission, Wilmette Institute is driven to remove barriers to entrance to our certificate program for diverse and economically challenged populations.

- Student diversity data is gathered during the application/enrollment process and is tracked and recorded through Populi by the Registrar. This data is collected annually in December.

- Formula: [(number of enrolled students from underrepresented populations per year / total student enrollment per year)*100].

"Become a Student" Web Page Conversion Rate

Universities, like corporations, optimize paid search on their landing pages because paid search accounts for 1% - 2% of higher education website traffic yet drives 20% - 30% of website leads. Most universities seek to optimize the number of enrolled students who pay tuition for financial profit and stability.

No costs are associated with WI's academic services, so WI does not seek profitable revenue or large numbers of students for its programs. Rather, WI seeks to enroll a steadily growing number of highly qualified students who demonstrate a good fit for WI programs to maintain high student motivation and graduation rates.

WI sends targeted invitations to upper-division undergraduate and graduate students to learn about and enroll in the Social Transformation certificate program through the Office of the Registrar, Admission & Student Services. The invited visitors land on the [Become a Student](#) page of the WI website to learn details about the Social Transformation certificate program, which is driven by marketing efforts that include word of mouth and direct email. WI does not optimize for paid search its "Become a Student" web page or the general landing page for the Wilmette Institute website. The conversion rate from interest to enrollment helps guide the general marketing strategy.

WI marketing materials do not aim to convince students that WI is more competitive and prestigious or offers better student experiences than other institutions of higher learning. WI fills a specific niche in the higher education market by only offering a single certificate program focused on topics related to a spiritual perspective on social transformation.

- This metric (as a percentage) is collected by the Office of Communication and the Digital Tech Associate through Google Analytics.

- Formula: [(# of completed enrollments / # unique visitors to the "Become a Student" page on the WI website)*100]

Enrollment Indicator Benchmarks and Results

Key Indicators	Benchmark (annual)	2023 Results (baseline)	2024 Results (trends)	2025 Results (trends)
Percentage of enrolled students from underrepresented/ minority populations	50%	12/23 = 52%		
"Become a Student" Web Page Conversion Rate	5%	23/254 = 9%		

Analysis

Proportion of Students from Underrepresented Minority Populations Analysis
Wilmette Institute seeks to work with universities and students interested in a spiritual perspective on human and social development. Our marketing strategies will target specific populations of people who may be attracted to our approaches, content, and methodology because of their heritage and traditional liberatory practices. According to the CGS/GRE Survey of Graduate (Master and Doctoral) Enrollment and Degrees, Fall 2022, "25.9% of all first-time U.S. citizens and permanent resident enrollees were underrepresented minority (URM) students". Accounting for only degree programs in fields related to our Social Transformation certificate (Arts & Humanities, Education, and Social and Behavioral Sciences), the percentage of graduate URM students rises to 33.7.

(The CGS/GRE Survey did not count people of two or more races when one or more are from the preceding racial and ethnic categories in this list, whereas our data does include this group as URM students, accounting for some of the increase.)

Our working definition of an underrepresented minority (URM) is someone whose racial or ethnic makeup is from one of the following populations:

- African American / Black
- Asian: Filipino, Hmong, or Vietnamese
- Hispanic / Latinx
- Native American / Alaskan Native
- Native Hawaiian / Other Pacific Islander
- Two or more races, when one or more are from the preceding racial and ethnic categories in this list

Other populations may be added in the future.

WI aims to enroll at least 50% of our students from underrepresented and/or minority populations will help us measure the success of the element in our mission statement related to student diversity. A demographic analysis of our current and projected partnerships and other sources of students (Graduate Theological Union, the national Baha'i community, and North Carolina Central University) indicates that we can initially aim for approximately half of our students to come from underrepresented / minority populations. We aim to improve on the national average by promoting our programs among specific URM populations. Underrepresented minority students continue to drive much of the growth in first-time graduate enrollment among U.S. citizens and permanent residents over the past five years. As our partnerships grow and evolve, we expect a greater percentage of our students will come from URM students.

The pilot run of our Social Transformation certificate program in 2023 has relied on personal invitations and word-of-mouth marketing because the program is not accredited, and we cannot offer the program through partnerships with universities. During 2023, 52% of our students came from underrepresented minority populations, and we expect this percentage to continue while we promote the program through word-of-mouth marketing efforts. We expect to meet our student diversity goals as we gain accreditation for the program and begin to offer it in our partner universities, possibly in 2025 and beyond.

Suppose our statistics reflect that our students do not represent the diversity we expect. In that case, we will need to reexamine our enrollment strategy and make the appropriate modifications to our partnerships, buy-in from partner university administrators, and the content of our marketing efforts.

We experienced no unusual circumstances that affected the collection or reporting of these 2023 data.

"Become a Student" Web Page Conversion Rate Analysis
WI chose this KPI because it is a meaningful indicator of the effectiveness of our marketing and promotional efforts. In 2023, the data collected shows 9% against the benchmark of 5%. This confirms our initial strategy because although traffic to our "Become a Student" page is low compared to other universities, our conversion rate was high because visitors were often sent to our website through word-of-mouth recommendations.

In the years ahead, as we establish partnerships with institutions of high learning and offer courses in those universities, we expect our website traffic to grow along with enrollments in our Social Transformation certificate. We expect our conversion rate to remain relatively high because of our niche target audience and educational offerings. In the succeeding years of invited enrollments, we anticipate a progressive reduction of the percentage to allow word of mouth to grow through certificate alumni and current student outreach to invite like-minded students in their network to participate in the program.

2024 Planned Improvements
In 2024, WI will continue to apply its current enrollment strategy while also seeking to establish relationships with specific institutions of higher education that may lead to strategic partnerships in the future.

Financials – Revenue and Budgeting

Key Indicators for Annual Achievement
Below are the assessment instruments used to determine whether Wilmette Institute is achieving its mission relevant to its revenue and budgeting policies and practices.

Budget to Actual (Cost) Variance
To ensure WI can continue to pursue its mission, Wilmette Institute carries out an annual budget to actual (cost) variance exercise. The Executive Committee tracks the annual budget and actuals to probe causes of variances like execution failure, change in market conditions, an unexpected event (force majeure), or unrealistic forecast, and whether the variance is favorable or negative. Results allow the Executive Team to identify and address financial discrepancies in the new annual budget. Care is taken to carry out "the budget to actual variance exercise" regularly in enough detail to allow managers to understand what's happening to the operations while not overburdening staff.

WI carries out variance analysis relative to our performance indicator benchmark of 10%. Flexibility is built into the budget to accommodate variances of approximately 10%, whether favorable or negative. If our flexible budget analysis indicates a negative variance in expenses due to increased student demand, that may positively affect organizational growth. In contrast, a favorable variance may indicate lower student demand and harm organizational growth.

The Variance Formula equals the percentage of change between the annual budget and actuals.

Revenue Concentration
Revenue source and concentration indicate an organization's operational stability. This is an important factor in assessing the resilience of Wilmette Institute's operating model and its capacity to respond to changes in its operating environment. High levels of revenue concentration may impair WI's ability to respond effectively to changes in its operating environment.

The Executive Team makes annual budgets by evaluating key indicators to assess the diversification of the current revenue stream and how that contributes to the overall performance, including financial sustainability, growth, and qualitative analysis of stakeholder satisfaction. The key indicators focus on time, energy, and resource output. As WI is a religious non-profit educational institution, viability is based on the value WI generates to support its mission, sustainability, program quality, and operation efficiency.

Most of the funding for Wilmette Institute comes from two sources: earmarked direct contributions to the Wilmette Institute and budgeted allocations from the parent organization. The third and fourth streams are enrollment in extension courses and partnerships. The budget through 2028 is projected to remain stable with single-digit cost increases. This growth curve is manageable based on the small fraction the WI budget requires against the total annual parent company budget (less than 2%).

Comparatively few religious organizations that are non-profit in education operate in this fashion. In the U.S., there are nearly 1,000 colleges and universities with religious affiliations. Most seek federal aid, whereas Wilmette Institute does not. Some comparable non-profit religious institutions are Grove City College in Pennsylvania, Christendom College in Virginia, Pensacola Christian College in Florida, Patrick Henry College in Virginia, Wyoming Catholic College, and Gutenberg College in Oregon.

It is ideal for revenue to come from multiple sources. The key stakeholders in Wilmette Institute are the entire Baha'i community across the continental U.S. through donations to the parent organization's National Fund. Diversifying revenue streams is further being introduced with the long-term strategy to offer an accredited non-degree program to establish the parent organization's educational objectives for higher education with WI in the following areas:

1) General donations to the Parent Organization allocated to WI's budget, along with individual and group earmarked donations to Wilmette Institute
2) Earmarked WI Reserve Fund (endowment)
3) Partnership articulation agreements
4) Extension course fees

Unique to the Baha'i Institutions and its agencies, including Wilmette Institute, is the guideline to receive donations only from Baha'i membership. This might be best understood as an instrument to remain steadfast to its principles and not be swayed by any outside influence to change its mission or core values. Marketing is not limited but focused to a niche with more than 8,000,000 adherents and 180 national institutions worldwide, with over 1,000 communities across the U.S. Further, WI does not seek profit from its services. Revenues are allocated or sought to maintain adequate functioning of the administrative and academic resources necessary to fulfill its mission year by year for the long term.

The long-term goal is to see a shift from general donations to the parent organization allocated to WI's budget to individual and group earmarked donations to Wilmette Institute and earmarked for the WI Reserve Fund (endowment), both elements under the oversight of the parent organization.

The formulas in this KPI calculate percentage of changes between the benchmark and the annual results in each of the four revenue streams.

Revenue & Budgeting Indicator Benchmarks and Results

Key Indicator	Benchmark (annual)	2023 Results (trends)	2024 Results (trends)	2025 Results (trends)
Budget Variances	10%	10%		
Revenue Concentration (Parent Company)	20%	25%		
Revenue Concentration (Partnerships)	5%	2%		
Revenue Concentration (Earmarked and Reserve Fund)	70%	70%		
Revenue Concentration (Extension Courses)	5%	3%		

Budget to Actual (Cost) Variance Analysis

WI builds sufficient flexibility into its annual budget to accommodate cost variance of approximately 10%, either favorable or negative. The budget is based on baseline functioning and forecasted growth, measured principally in student demand. A variance may occur if enrollment growth is reconsidered and staff requirements are impacted.

In 2023, WI reported a budget to actual (cost) variance of exactly 10%. The variance was negative. The key to budget health at WI is transparency towards and consultation with our parent organization, which may allow for adapting to and addressing variances in unplanned

growth. The variance did not negatively impact WI operations because it was detected early enough to allow for consultation with our parent organization, resulting in strong, immediate support and necessary adjustments.

No unusual circumstances that affected the collection or reporting of these data were detected. The information is complete, and there is no reason to believe it contains outliers.

Revenue Concentration Analysis

WI's revenue concentration benchmarks were selected based on past performance and longstanding agreements with our parent organization, and growth forecasts were also considered. Our 2023 results are the following:

Key Indicator	Benchmark (annual)	2023 Results (trends)
Revenue Concentration (Parent Company)	20%	25%
Revenue Concentration (Partnerships)	5%	2%
Revenue Concentration (Earmarked and Reserve Fund)	70%	70%
Revenue Concentration (Extension Courses)	5%	3%

Our revenue concentration analysis indicates acceptable variance in 2023 from our benchmark values. 2023 saw sustained growth in student demand for WI's educational services, but the growth did not outpace the budgeted expenses, so the revenue stream concentrations and amounts remained predictable.

Our plans, projects, projected budgets, and revenue sources are shared transparently with our parent organization. Support has been forthcoming unreservedly as WI continues to fulfill its mission and grow sustainably.

No issues were encountered in gathering or reporting these data, and no outliers have been detected.

2024 Planned Improvements

In its early stages of establishing itself as an institution of higher learning, these goals stand paramount in the year ahead:
1) Complete and submit the accreditation documentation in order to achieve our mission goals.
2) Improve procedures and policies, standardize our operations, and achieve external accreditation
3) Move from piloting courses to creating articulation agreements with specific higher education institutions
4) Marketing for enrollment in the certificate program.

Education – Academics & Technology

Key Indicators for Annual Achievement
Below are the assessment instruments used to determine whether Wilmette Institute is achieving its academically oriented mission goals using effective educational technology.

The Wilmette Institute is an educational institution. Through adequate education, meaningful change happens in individuals and communities. The KPIs in this section of our IEP indicate the need for students to complete our courses and program to receive the benefits they offer. They also indicate the importance of the educational experience in which faculty are readily available to support students and in which the educational technology used to deliver our online programs supports students in fulfilling the learning outcomes. Together, student completion, adequate faculty support, and meaningful technology experiences allow WI students to have "distinctive learning experiences" offered by WI.

The Wilmette Institute is also a learning institution. All student experiences, positive or not, provide opportunities to learn and make adjustments to our offerings. However, we are keenly interested in analyzing the experiences of students who successfully complete our programs to identify and reinforce elements that contributed to that success. We operate under the assumption that there is a direct correlation between the quality of the program and the percentage of students who successfully complete it.

Program Completion Rate
To ensure that WI meets its mission to offer a quality certificate program, Wilmette tracks the percentage of students awarded certificates for completing the program among those who are eligible for program completion. The Registrar uses Populi, our Student Information System, to track and report this data using the following formula:

[(number of students who completed the program per year / total number of enrollments eligible for course completion)*100%]. This formula allows WI to track students' success in the program year to year.

Course Withdrawal Rate
Students can _drop_ a course within two weeks of the first day of class by notifying the faculty of their decision in writing. If a student decides to remove him or herself from a course more than two weeks after the first day of class but still during the first half of the course by writing a letter to the registrar justifying their decision, they receive a W for _withdrawal_ on their transcript. If no letter is written or a student removes themselves from a course after its midway point, the student will receive an "Emerging Proficiency" grade.

WI tracks course drop and withdrawal rates as indicators of the quality of each course and the strength of the admissions process to admit students with a high level of fit for the certificate program. Tracking course withdrawals allows WI administrators to intervene when necessary to provide extra support for struggling students to help them successfully complete the program. Withdrawal data also provides input to allow WI to evaluate course quality and faculty performance.

In the future, WI plans to monitor reasons for dropped courses and withdrawals to direct students to academic and/or wellness resources before confirming their request to prevent unnecessary drops and withdrawals.

Formula: # of drops during the drop period per year / # of drop opportunities (sum of individual enrollments in all courses) per year * 100

Formula: Total # of W per year / # of W opportunities (sum of individual enrollments in all courses) per year * 100

Student-to-Faculty Ratio
By offering a low student to faculty ratio, WI has smaller classes so that every student is more likely to benefit from personalized attention. WI focuses on high-quality pedagogical practices that are more personalized for each student. WI does not have a physical campus, nor can it offer various academic or well-being services or resources, so our student experience is focused on the course, in Moodle, and video conferences.

WI tracks the student-to-faculty ratio because it is a reliable indicator of program quality. The mission of the Wilmette Institute is to offer "distinctive learning experiences characterized by action and reflection," and adequate faculty attention to student learning is a key component of the WI learning experience.

Given the Wilmette Institute's mission of offering quality academic programs with distinctive learning experiences, tracking the faculty-to-student ratio is crucial for ensuring personalized and interactive education. WI aims to maintain an adequate faculty-to-student ratio to allow for pedagogically sound educational experiences. The Registrar tracks and reports this information through Populi.

Formula: Total # of enrollments per year / total # of faculty during that year

IT Support Rate
As a distance learning institution that delivers courses online, WI recognizes the importance of educational technology in the success of its courses and programs. Confidence in using educational technology is key to the success of WI students and faculty. WI carefully selects the educational technology tools to employ in our programs and makes various efforts to educate students and faculty in their use. Among these efforts, WI offers a 6-hour orientation course, of which 2 hours are dedicated to providing practical support in using our learning management system, Moodle. On our website, in our faculty and student handbooks, and on Moodle course pages, WI also provides tutorials for the use of other tools such as Zoom, Google Workspace, podcast catchers, Grammarly premium, and our library services.

WI tracks the number of students and faculty who reach out for IT support with their courses. Our Digital Support Associate and Student Services are pleased to support students and faculty with their IT needs. However, WI aims to keep the number of IT support requests to a level indicating that students and faculty have easy access to explanations and tutorials for WI's educational technology tools. Too many IT support requests indicate confusion among students and faculty about the tools used by WI, which could mean poor communication and educational efforts by WI about technology.

Formula: [total # of requests by students and faculty for IT support services per year / total # of registered students and faculty per year].

Activism / Practical Application Metric
WI's Social Transformation Certificate Program aims to raise the capacity of students to contribute to public discourse from a Baha'i perspective. Contributing to public discourse in our certificate program has concrete, practical implications because our course projects help students to engage in iterative dialogues with practitioners in the field (topic) under study to learn from their experiences, perspectives, aspirations, and methods and to share with them some insights gained from the course resources that may be pertinent to these conversations.

Significant learning occurs when students reflect on their experiences. Students are asked to make a brief presentation to the people or organizations they work with to share the insights they gained through the conversations. Students are graded on the quality of their subsequent presentations to the class and on their final reflective essay about their field experience. This metric measures student success with these projects as they are the heart of our course and program learning outcomes.

Formula - 80% of students in each course will achieve an 80% grade or better on the course project.

Academics & Technology Indicator Benchmarks and Results

Key Indicator	Benchmark (annual)	2023 Results (baseline)	2024 Results (trends)	2025 Results (trends)
Program Completion Rate	60%	3/11 = 27%*		
Course Drop Rate	<10%	New metric to be tracked in 2024		
Course Withdrawal Rate	<10%	4/29 = 13.8%		
Student-to-Faculty Ratio	15:1	29:4 = 7:1		
IT Support Rate	4	7.1		
Activism/Practical Application Metric	80% grade for 80% of the students on the course project	24/26 = 92%		

*preliminary completion rate, students have a maximum of two years to complete. Eleven students are still studying.

Analysis

Program Completion Rate Analysis
Data on program withdrawals often comes from studies conducted in universities, but they are useful to bear in mind. Students' social and academic integration or engagement, persistence, and eventual goals for graduation are impacted by interactions between demographic and contextual factors. Most students depart higher education due to personal or home reasons, followed by job prospects, poor quality of education, ability deficits, and a perceived negative culture. Low-income and minority students drop out at a higher rate, and African-American students cite financial reasons more frequently (source: Are Course Withdrawals a Useful Student Success Strategy? Patrick Akos, the University of North Carolina at Chapel Hill Scott James, Hobsons, Inc).

The Wilmette Institute offers a low-intensity certificate program, which is relatively short in duration as students can complete it in one year. Students take one course at a time as they are not full-time, which facilitates studying while working and managing family life. There are no expenses associated with our certification program. Our course topics are chosen for their relevance to students' lives, our programs are designed to be meaningful and motivating, and WI gives abundant attention to course design and development. Our pedagogical model aims

for high student engagement with the course topic and in students' local communities. It is hoped that these factors will raise student persistence in the program.

Our admissions process aims to admit students with a high level of fit with the program's outlook and methods.

Course Drop and Withdrawal Rates Analysis
The current curricular offerings, organization, and timetable for program completion make course drops and withdrawals somewhat detrimental to program completion. The Social Transformation program has 4 courses, offered one at a time, starting three times per year. Students have up to 2 years from their registration in their first course to complete any 3 courses in any order. In 2 years, a student may drop or withdraw from up to 3 courses and still have time to pass the minimum number of courses necessary to complete the program within the allotted time frame. WI feels this arrangement is generous, allowing for various student circumstances and preferences.

A certain number of course withdrawals is anticipated as our students are not full-time, and their circumstances change and interrupt their studies. We know that among undergraduate students in the United States, the percentage of course dropouts is greater among people under 35 years old than among students between 35 and 64 years old. We are also conscious that White students are the most likely to drop out, at 33.4% compared to all other college dropouts (source: https://educationdata.org/college-dropout-rates). Our target audience is college and graduate-level students, who are mostly between 20 and 35 years old, and we aim to enroll at least 50% of our students from underrepresented and/or minority populations.

Withdrawals are not a permanent feature of the student transcript, as a grade can replace them upon completing a course through a second attempt. Nevertheless, if the number of withdrawals becomes a prominent feature of student patterns, the program's effectiveness will be undermined. Akos and James (2020) affirm that "course withdrawal is a behavioral indicator that may suggest instructional failure, changing personal circumstances, a lack of academic integration, or a combination of challenges. In all, while not a precise measure of engagement, Adelman (2006) described course withdrawal and its effects on students as 'degree-crippling' (p.xxii)."

WI aims for less than 10% drop and withdrawal rates, accounting for unpredictable student circumstances while reflecting appropriate student integration into the program and each course. Students are required to request a Withdrawal from a course and to justify their request, giving WI key information needed to analyze the reasons for withdrawals and make adjustments to the program and courses to minimize them.

Student-to-Faculty Ratio Analysis
2023 represented an unusual experience for the Social Transformation certificate because the program was brand new. Recruiting was challenging because the program did not have a track record among our target audiences, and WI could not offer course credits. These circumstances led to relatively few student enrollments and small class sizes.

Further, the Social Transformation certificate was only offered directly by WI in 2023 and not in partnership with other higher education institutions, a situation that we anticipate will change in the coming years. We anticipate that offering our certificate program directly and through partnerships will bring in greater numbers of enrollments and student-to-faculty ratios that better represent the future of the certificate program.

IT Support Rate Analysis

Students and faculty regularly contact their faculty, the Digital Support Associate, and Student Services for support with educational technology. Students and faculty request support through phone calls and email. A team of WI administrators determined that the reduced number of students and faculty in our programs does not warrant formalizing the process by creating tickets for support and that we will continue to work through the phone and over email to maintain personalized support.

In 2023, our Digital Support Associate and Student Services responded to 205 IT requests from 19 students and 3 faculty. By tracking the number of requests for support and other data about the requests, like the course the student is enrolled in, the topic, and the specific issue, we aim to analyze the data to identify areas of confusion and other weaknesses that could be strengthened and therefore reduce the confusion among students and faculty about WI's educational technology.

Students and faculty will always reach out for technology support because the tools are new to them, they fail to read and follow the instructions and the tutorials, or they prefer a human response to their questions. Based on our experience, we have decided that 6 is an appropriate number of IT support requests per person for 2024 and 5 per person per year (enrolled students and active faculty) from 2025 and beyond.

2023 provided unusual circumstances for this indicator because the program was brand new, and the students were new to the program. All our faculty have experience teaching previous versions of our certificate courses for WI. We did not have final versions of our student and faculty handbooks and educational technology instructions and tutorials for the first few courses, and some educational technology tools were added and others discarded during 2023. As a result, students and faculty made many requests for technical support. In addition, a robust system to document requests for technical support was implemented in the last quarter of 2023, so the data from that year may not perfectly represent reality.

We anticipate that a greater percentage of our students will take the Orientation Course that helps students use Moodle. Our system is in place to document requests and reflect on the data gathered. The selection of educational technology tools in our courses is more stable now. The means through which we communicate and educate students and faculty to use the tools are also stronger. For these reasons, our efforts should provide much higher-quality data regarding requests for technical support in 2024, and students and faculty should have fewer technology challenges per person.

Activism / Practical Application Metric Analysis

WI's course projects are designed by the Course Development and Assessment Team. Although the project has slight variances between courses according to the course topic, they are essentially the same. Faculty have autonomy in its implementation and may flexibilize certain aspects of the project when necessary. All faculty members use the same rubrics and have the same timelines for the course projects, so comparing student outcomes within and between courses is feasible.

In 2023,19 students carried out 26 course projects in 3 Social Transformation courses. Students were graded on their class presentations and reflection essays according to the rubrics for this purpose. In the first course, 7/9 students obtained at least 80% grade on the combination of the presentation and the essay, while in the second course, 7/7 students obtained over 80%, and in the third course, 10/10 students accomplished the same. In total, 24/26 (92.3%) students obtained the benchmark grade on the course project in 2023.

The students who carried out these course projects lived all over the country in various circumstances. Some students had easier access to practitioners in the topic under study, and others had strong relationships with practitioners before taking the course. Therefore, some students and projects yielded better results than others. The presentations and essays are based on field notes taken during three visits. We do not grade those field notes but provide formative feedback; students use them for their presentations and essays. Our feedback focuses student attention on their capacity to analyze situations, identify underlying assumptions in the organizations, and apply concepts in the readings to the reality they find through their conversations. All this is to say that our grades are not based on the project's success but on the capacities students build throughout the course.

Beyond the variations in the student projects, no unusual circumstances affected the collection or reporting of these data because they are based on student grades reported by faculty. There is no reason to suspect that the data are incomplete or contain outliers.

2024 Planned Improvements
In 2024, WI has no plans to deviate from the current procedures and policies. WI will continue to offer courses in the Social Transformation certificate program at the current rate and format. The lessons WI learned in the first year of the certificate's implementation will be systematized and incorporated into the program for improvement.

Student Support Services

Key Indicators for Annual Achievement
Below are the assessment instruments used to determine whether Wilmette Institute is achieving its mission as a result of the implemented student support services strategies.

Student End-of-Course Survey Results
End-of-Course Student Surveys are critical to WI's efforts to gauge students' perspectives, directly reflecting the Wilmette Institute's mission to offer quality learning experiences. The survey is optional and anonymous, although follow-up aims to increase student participation. The survey is comprehensive, with 38 questions plus one question per course learning outcome on the following topics: registration, orientation course, course materials, course instructors, methodology and assessment, course structure, relation to the global Baha'i plan, learning outcomes, and a general open-ended question. All questions, except for the final question, are multiple choice with a scale from Strongly Agree (5) to Strongly Disagree (1).

The Registrar and Digital Support Associate measure the survey results quantitatively by compiling data, obtaining the mean per course, and then a general mean for all courses each year.

Student End-of-Program Survey Results
End-of-program evaluations are a critical KPI for tracking student support services as they provide direct feedback on those services' effectiveness throughout a student's educational experience. Students in our certificate program are asked to take an End of Program Student Evaluation Survey. This survey is not course-specific. Students answer using a Likert scale of Strongly Disagree (1) to Strongly Agree (5). This survey includes an introduction, a section on academic goals and rigor and then asks students to rate fulfillment of each program learning outcome according to its assessment indicators. The survey also includes sections on the present and future application of student learning, staff, and faculty evaluations, and finally provides an opportunity for students to add comments in their own words. This survey is optional and anonymous and should take 10 to 15 minutes to complete.

WI's benchmark for this survey is 80%. Results are calculated by adding the total points for all questions per year, dividing that sum by the total number of possible points, and multiplying that by 100. Qualitative results are not part of this calculation but are included in the Program Evaluation Report as a key input for the Program Evaluation process. Program evaluators can use the data as they see fit to understand the program results and make suggested improvements.

Formula - Total points for all questions per year / total number of possible points per year * 100

Student Satisfaction Survey Results
Students complete a Student Satisfaction Survey after each course. The survey is not course-specific. The results are reviewed once every six months by the Registrar. She turns the results from the previous six months into a report compared to cumulative results. The report is called the "Student Satisfaction Survey Report." The report is shared with the Executive Committee every six months. The Executive Committee can take further action on these reports as it sees fit.

Students answer based on a 5-point Likert scale from Definitely no (1) to Definitely yes (5). WI's benchmark for this measurement is 80%, calculated by adding the total points given by students for all questions each year, dividing that sum by the total number of possible points, and multiplying that by 100. The benchmark is calculated over a 1-year period. This three-question

survey is anonymous. It should take students only a few minutes to complete. Survey results will be tabulated and shared with the Course Development and Assessment Team, the Chief Academic Officer, and annually with all Wilmette Institute stakeholders.

Here are the survey questions:

- Did you achieve, or will you have achieved upon completing your studies, the goals you had when you started this course or program?
- Would you recommend these studies to a friend?
- All things considered, were you satisfied with your studies with us?

Formula - Total points given by students for all questions each year / total number of possible points per year * 100

Student Support Services Indicator Benchmarks and Results

Key Indicator	Benchmark (annual)	2023 Results (baseline)	2024 Results (trends)	2025 Results (trends)
Student End-of-Course Survey Results	average 4.0/5.0 (80%)	4.70/5 = 94%		
Student End-of-Program Survey Results	average 4.0/5.0 (80%)	No results for 2023*		
Student Satisfaction Survey Results	Average 4.0/5 (80%)	96.03%		

*During 2023, the first cohort began its first year of a two-year program, so no end-of-program surveys were administered that year.

Analysis

Student End-of-Course Survey Results Analysis
WI offered 3 Social Transformation courses in 2023. After the first course, the Chief Academic Officer made substantive changes to the student end-of-course survey. Some questions remained, others were improved, and new questions were added. Therefore, the results from the first course differ from those from the other two courses. For this reason, averages were found per course and then averaged to obtain a final result for 2023. We anticipate the survey will not change in 2024, facilitating data collection and analysis.

Results are helpful when analyzed per question, per course, and when compiled per year. We will report results per year as a KPI because that will give us a broad vision of the program's success from students' perspectives. Nevertheless, WI will document and report results from this survey for the Course Evaluation Report, which will be used to analyze and improve our courses.

Student End-of-Program Survey Results Analysis
None of the students who joined the Social Transformation Certificate program in the first cohort have finished the program yet, and they have, therefore, not taken the end-of-program survey. No data is available at this time for 2023. We anticipate that several students from the first cohort will finish the program during 2024, and results from their end or program surveys will become available.

Student Satisfaction Survey Results Analysis
All students took our student satisfaction survey for each course completed in 2023. The survey was not modified during 2023, so all results are comparable. There were no unusual

circumstances that affected the collection or reporting of the data. There is no reason to suspect that the information is incomplete or contains outliers.

At this point, very little variation exists in the data, providing little insight into specific aspects of the program that need improvements. A high level of student satisfaction exists in our students.

2024 Planned Improvements
Dozens of modifications have been made to the services we offer students during 2023, and we anticipate that such improvements will take effect and be stabilized during 2024. WI does not have a plan outside of implementing the KPIs outlined in this document, using the formulas and methods stated throughout. As we close out our pilot year for our Social Transformation Certificate program, our reflections and efforts have led us to rethink and rewrite many of our policies, procedures, and manuals, resulting in many strategic initiatives and improvements across the board. No administrative or academic area has not been innovated in 2023. Most of these improvements are outlined in this document and throughout the documentation published on our website.

Personnel

Key Indicators for Annual Achievement
Below are the assessment instruments used to determine whether Wilmette Institute is achieving its mission as a result of the management strategies implemented.

Staff Participation in Professional Development Activities
The percentage of staff participating in training reflects the institution's commitment to continuous learning and excellence in teaching. Active participation in professional development opportunities ensures that staff are equipped with the latest knowledge and skills for their administrative responsibilities, which is crucial for delivering high-quality services aligned with the mission of the Wilmette Institute. High participation rates indicate a culture of ongoing improvement and dedication to mission achievement, enhancing students' and faculty's overall experience and outcomes.

WI staff are encouraged to participate in professional development opportunities that aim to enhance their professional performance. Staff are expected to participate in at least two yearly professional development events. The Registrar tracks all staff yearly to confirm the registration and completion of relevant professional development.

Formula: # of staff who complete 2 professional development activities of their selection per year / total number of WI staff

Faculty Participation in Professional Development Activities
The percentage of faculty participating in training reflects the institution's commitment to continuous learning and excellence in teaching. This KPI measures the institution's engagement with the broader academic and professional community. Internal and external professional development for faculty indicates the institution's commitment to staying current with educational trends, pedagogical methods, and content knowledge, which directly contributes to the quality of instruction and the relevance of the curriculum.

WI faculty are encouraged to participate in professional development opportunities that aim to enhance their professional performance. All faculty are expected to participate in at least three yearly professional development events. The Registrar tracks all faculty yearly to confirm the registration and completion of relevant professional development.

This data is self-reported by faculty members each year when they are asked to update their CVs and report to the registrar the number of professional development activities they completed during the year. The Registrar compiles this information.

Formula: # of faculty who complete 3 professional development activities of their selection per year / total number of WI faculty members

Percentage of Faculty and Staff from Underrepresented Minority Groups
Wilmette Institute seeks to work with universities, faculty, and students who express interest in a spiritual perspective on human and social development. Our marketing strategies will target specific populations of people who may be attracted to our approaches, content, and methodology because of their heritage and traditional liberatory practices.

According to the National Center for Education Statistics, the percentage distribution of full-time faculty in degree-granting postsecondary institutions by race/ethnicity and sex in Fall 2021:
- Asian 12%
- Black 7%

- Hispanic 6%
- White 73%
- American Indian / Alaskan Native and Pacific Islander < 1%
- Two or more races 1%

WI is not a degree-granting institution, nor does WI hire full-time faculty, so these data do not completely reflect our reality. Nevertheless, they reflect the reality of most postsecondary faculty in the United States and can guide us to define our goals.

At WI, our working definition of an underrepresented minority (URM) is someone whose racial or ethnic makeup is from one of the following:

- African American / Black
- Asian: Filipino, Hmong, or Vietnamese
- Hispanic / Latinx
- Native American / Alaskan Native
- Native Hawaiian / Other Pacific Islander
- Two or more races, when one or more are from the preceding racial and ethnic categories in this list

The national pool of underrepresented minority faculty is small, and competition for their services is keen. WI fills a specific niche in that WI does not expect faculty to carry out academic research, and all WI faculty are part-time, only hired to teach one course at a time. WI has only four total faculty at this point, so even though it is challenging to find qualified faculty in general and even more challenging to find qualified underrepresented minority faculty, our demand for faculty is still small.

In alignment with its mission, Wilmette Institute is driven to remove barriers to entrance for diverse and economically challenged populations. Our KPI for underrepresented minority students is 50%, so our faculty should mirror this reality. This data is collected yearly.

Formula: [(number of faculty and staff from underrepresented populations / total number of faculty and staff)*100%].

Personnel Indicator Benchmarks and Results

Key Indicator	Benchmark (annual)	2023 Results (baseline)	2024 Results (trends)	2025 Results (trends)	2026 Results (trends)
Staff Participation in Professional Development Activities	100%	6/6 = 100%			
Faculty Participation in Professional Development Activities	100%	4/4 = 100%			
Percentage of staff and faculty from underrepresented groups	50%	4/7 = 57%			

Analysis

Staff Participation in Professional Development Activities Analysis
With small numbers of students and faculty, WI's operations are still relatively straightforward. WI aspires to offer high-quality, transformative academic programs for everyone involved, even staff. WI administrators and faculty meet regularly to review our programs. The discussions are often philosophical, so all WI staff members have a common vision of our work. At the same

time, a growing institution is often pushed past its accustomed comfort zones in order to accommodate new administrative demands. Professional development can be crucial in supporting staff in their new professional responsibilities, and WI encourages staff to seek quality training relevant to their assigned tasks. All WI staff have willingly sought training and used the knowledge and skills gained to improve their performance.

We experienced no unusual circumstances that affected the collection or reporting of these 2023 data.

Faculty Participation in Professional Development Activities Analysis
WI's mission statement asserts, "We seek to understand how a Bahá'í perspective, applied to prevalent discourses, helps build a more compassionate, just, and inclusive society." Gaining a deep understanding of specific public discourses on topics relevant to social transformation like race relations, sustainable development, education, and the nature of social change itself is vital to fulfilling the program and course learning outcomes. Remaining current on the course topics requires constant effort, and professional development can be key to that goal.

WI offers an innovative pedagogical approach for all its courses that encourages students to engage in meaningful conversations in their communities on the course topic. It is often challenging for faculty to effectively accompany and assess students in unpredictable and varying situations. WI offers internal professional development to support faculty in this endeavor and encourages faculty to seek external trainings.

WI has a small number of faculty, and they are all self-motivated to seek continuous professional development opportunities that help them become effective faculty. WI experienced no unusual circumstances that affected the collection or reporting of these data. There is no reason to suspect this information is incomplete or contains outliers.

Percentage of Staff and Faculty from Underrepresented Minority Groups Analysis
Wilmette Institute seeks to work with universities and students interested in a spiritual perspective on human and social development. Our marketing strategies will target specific populations of people who may be attracted to our approaches, content, and methodology because of their heritage and traditional liberatory practices.

Our target to hire at least 50% of our staff and faculty from underrepresented minority populations will help us measure the success of the element in our mission statement related to diversity. This goal mirrors our KPI to recruit 50% of our students from underrepresented minority populations, which was derived from an analysis of our current and projected partnerships and other sources of students. As our partnerships grow and evolve, we expect a greater percentage of our students and faculty to come from URM populations.

During 2023, 50% of our staff (3/6) and 50% of our faculty (2/4) come from underrepresented minority populations. Discounting the overlap, 57% of both groups (4/7) come from underrepresented minority groups.

The position descriptions published by our Human Resources department explicitly state that WI staff and faculty will be working with diverse populations, which often attracts a diverse application pool. Also, some of our staff and faculty members started at WI as students and gradually worked their way into leadership positions.

We experienced no unusual circumstances that affected the collection or reporting of these 2023 data.

2024 Planned Improvements

WI plans to continue to implement the procedures and policies outlined in this document and to monitor the progress of each through the formula for each KPI. WI has no plans to make significant changes to these procedures in 2024.