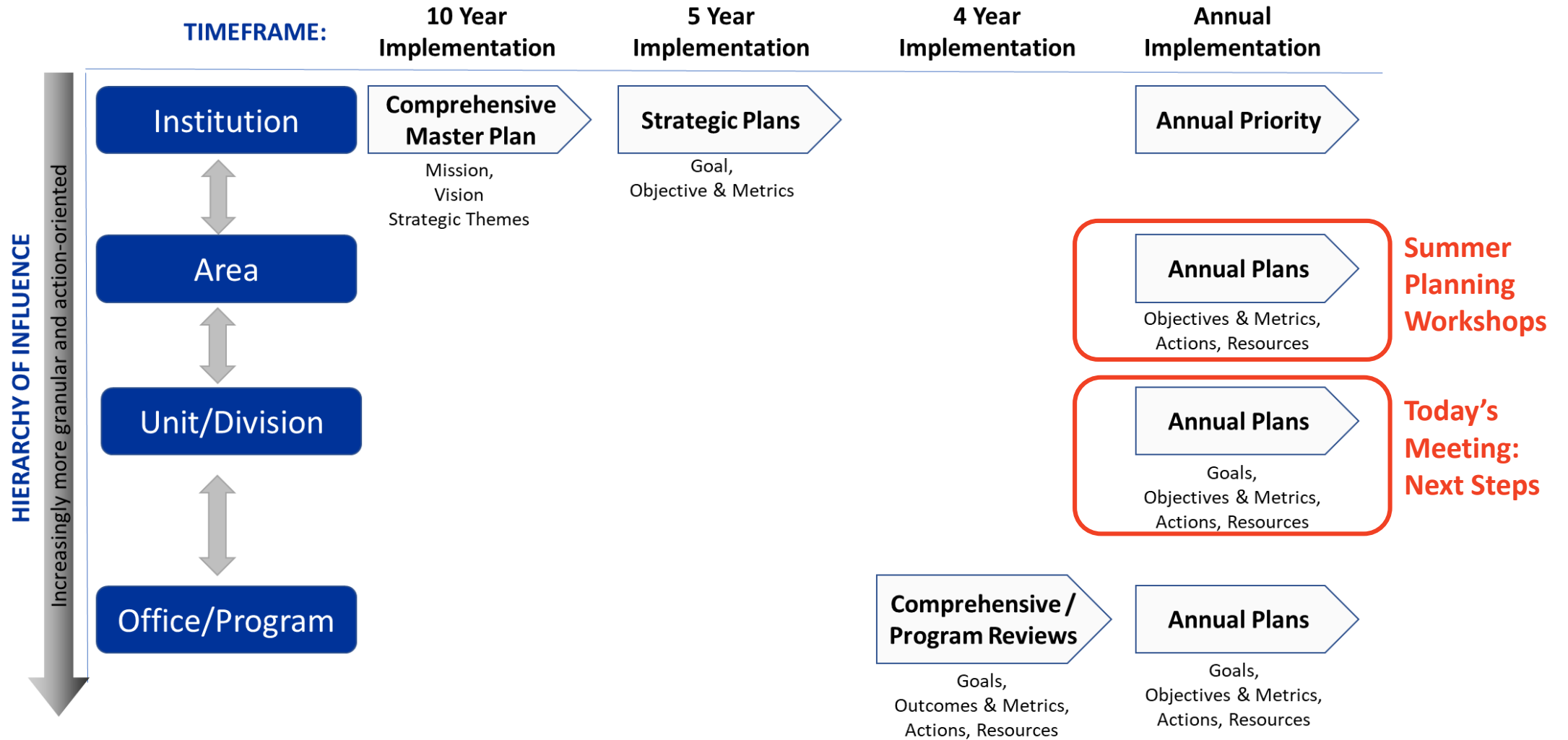# FY2021-22
Annual Planning Pilot
Kick-Off Meeting – Units/Divisions

INSTITUTIONAL RESEARCH & PLANNING

SEPTEMBER 17, 2020

Work Completed to Date

	10 Year Implementation	**5 Year Implementation**	**4 Year Implementation**	**Annual Implementation**
TIMEFRAME:				
Institution	**Comprehensive Master Plan** Mission, Vision Strategic Themes	**Strategic Plans** Goal, Objective & Metrics		**Annual Priority**
Area				**Annual Plans** Objectives & Metrics, Actions, Resources
Unit/Division				**Annual Plans** Goals, Objectives & Metrics, Actions, Resources
Office/Program			**Comprehensive / Program Reviews** Goals, Outcomes & Metrics, Actions, Resources	**Annual Plans** Goals, Objectives & Metrics, Actions, Resources

HIERARCHY OF INFLUENCE
Increasingly more granular and action-oriented

Summer Planning Workshops

Today's Meeting: Next Steps

Agenda

- Review the Area Objectives for FY2021-22

- Offer guidance for unit-level annual planning and next steps for FY2021-22

- Present an overview of the Annual Planning & Budgeting calendar for FY2021-22

After Summer Planning Workshop
# Review of FY2021-22 Draft Area Objectives

Two issues identified

- Too many objectives across all Areas with some overlap

- Some Area objectives were more operational than strategic. Implement these in the units/divisions?

Solution: Consolidated/Revised the Area Objectives

- Output from the workshop used as input into five broader objectives which are shared by multiple Areas

Planning Process
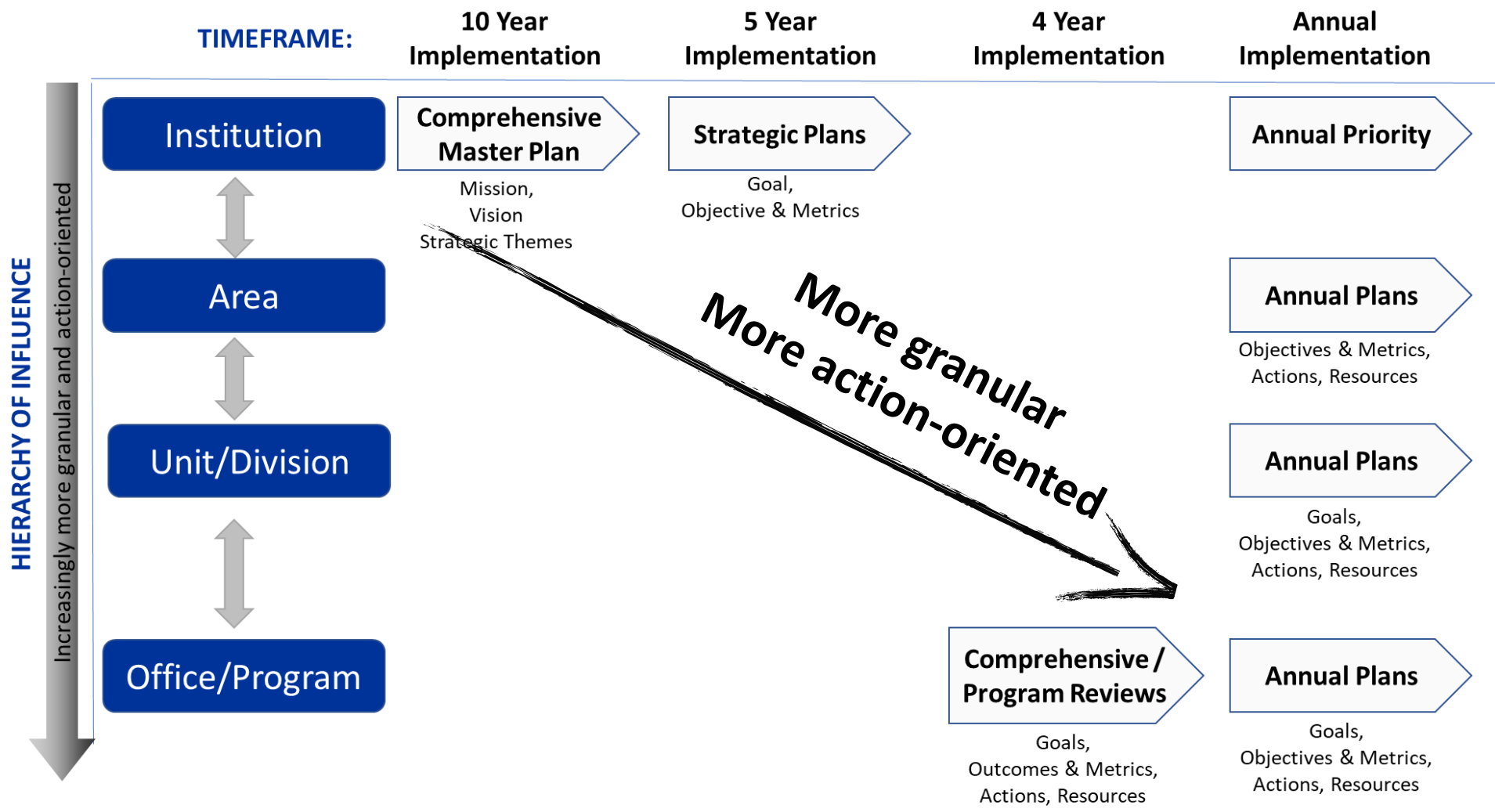
FY2021-22 Area Objectives

1. Support all ECC students in achieving their educational goals by providing clear program pathways and removing barriers

2. Build an inclusive teaching and learning environment that support quality education for all, and that assists students to stay on the pathway from point of entry to attainment of credentials and careers

3. Address existing and emerging workforce and employment opportunities needs of non-traditional students

4. Build an institutional environment that engages in continuous assessment to improve overall effectiveness and efficiency in pursuit of equitable student and employee success

5. Demonstrate engagement and commitment across ECC's community constituencies

Annual Planning Process

FY2021-22 Annual Planning & Budgeting Rollout (Pilot): Purposes

To strengthen the link between planning and budgeting

- Align budget requests and approvals to clear goals, objectives and actions.
- Provide the opportunity to adjust annual plans after budgets have been approved. Pace the implementation of set priorities considering available funding.

To improve communication within the planning and budgeting processes

- Prioritize & approve budget requests in a transparent way with criteria that is consistently applied using rubrics
- Provide the time and space to cascade priorities from annual plans, budget requests and budget decisions to all stakeholders

FY2021-22 Annual Planning & Budgeting Rollout (Pilot)

Transition to a new Nuventive Improve platform

- To track additional planning elements: goals, objectives, performance indicators & targets, actions, and high-level resource needs
- To map alignment of goals and objectives across all areas, unit/divisions, office/programs

Gradual phased roll-out to manage scope of change and to work through technical issues

- **Administrative Services, Human Resources, President's Office** areas will participate in the pilot for FY2021-22 planning which starts September 2020
- **Academic Affairs and Student Services** areas will continue to use the existing Nuventive platform for FY2021-22 planning
- All Areas will use new Nuventive Improve platform for the FY2022-23 planning process which begins in August 2021

Calendar & Next Steps

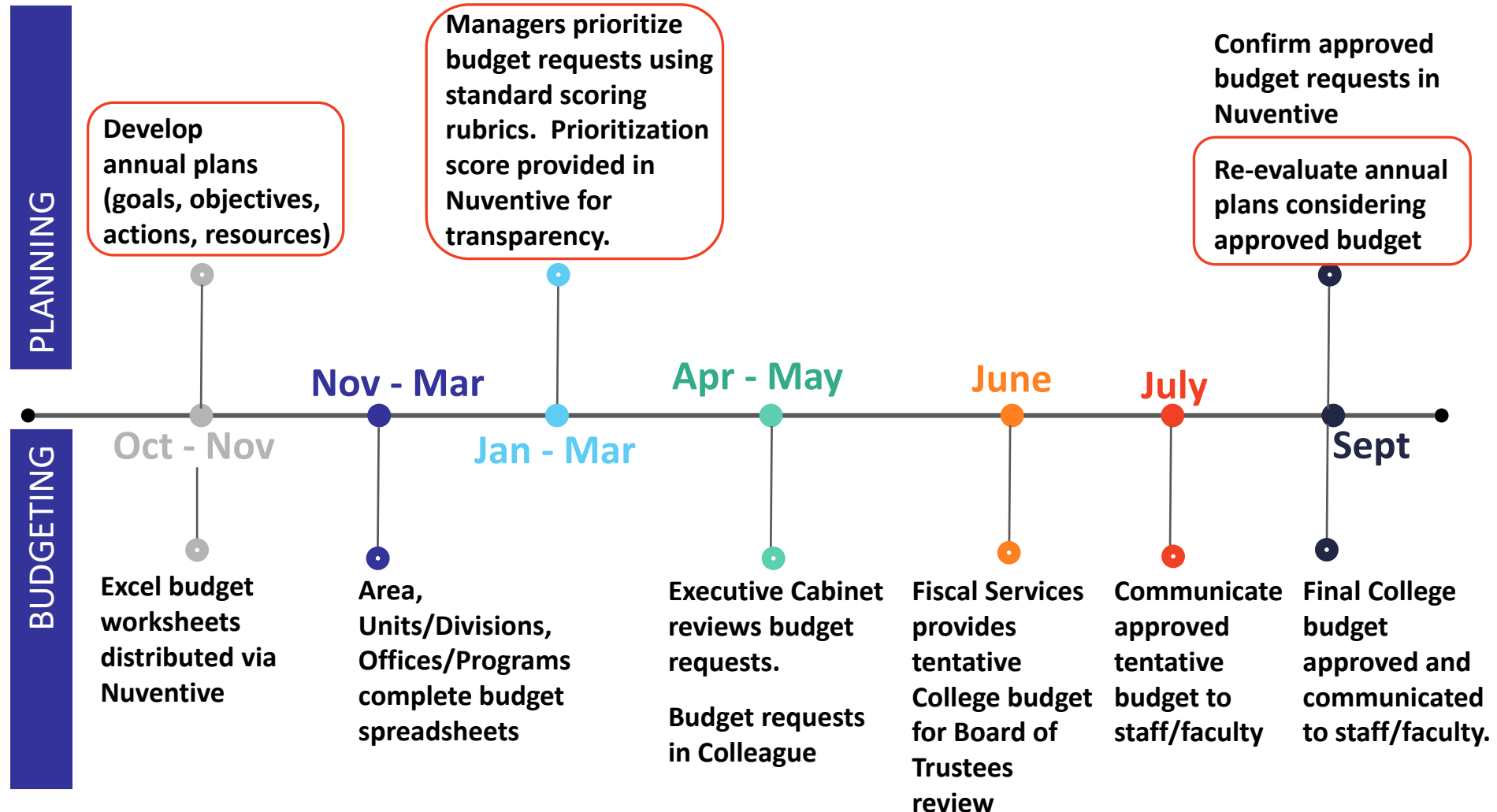# Major changes to the current process in the pilot

1. Budgeting process will begin earlier
   - The Excel budgeting worksheet from Fiscal Services will be available during the planning phase. Start to identify budget needs while setting goals, objectives, actions, etc.

2. Excel budget worksheets will be distributed and submitted through Nuventive for version control

3. Use rubrics for budget prioritization

   - All managers will use standard scoring rubrics to prioritize budget requests for transparency.
   - Budget request approval or rejection will be communicated via Nuventive so annual plans can be adjusted given available funding

FY2021-22 Planning & Budgeting Calendar

Annual Planning & Budgeting Rollout (Pilot)

ADMINISTRATIVE SERVICES,

HUMAN RESOURCES &

PRESIDENT'S OFFICE

Timeline Overview: Pilot

PLANNING

Develop annual plans (goals, objectives, actions, resources)

Managers prioritize budget requests using standard scoring rubrics. Prioritization score provided in Nuventive for transparency.

Confirm approved budget requests in Nuventive

Re-evaluate annual plans considering approved budget

Nov - Mar   **Apr - May**   **June**   **July**

Oct - Nov   **Jan - Mar**   **Sept**

BUDGETING

Excel budget worksheets distributed via Nuventive

Area, Units/Divisions, Offices/Programs complete budget spreadsheets

Executive Cabinet reviews budget requests.

Budget requests in Colleague

Fiscal Services provides tentative College budget for Board of Trustees review

Communicate approved tentative budget to staff/faculty

Final College budget approved and communicated to staff/faculty.

Annual Planning Template

Definitions

Goals are long-range, broad statements that express desired results. They reflect the key role and responsibilities of the entity.

> Example of a goal (from IRP):
> *"Champion the re-engineering of the strategic and annual planning processes."*

Objectives are short-term, action-oriented statements (steps) that must be done in order to achieve the desired goal.

> Example of an objective: *"By Fall 2020, all areas, units/divisions, and offices/programs will have clearly articulated annual goals and objectives."*

Definitions

<u>Performance Indicators / Accomplishments:</u>

To track progress towards achieving an objective.

Could be quantitative or linked to the successful completion of a project (e.g. the development of a document, the installation of a software, etc.).

<u>Example of a performance indicator:</u> *"Percentage of managers who participated in the Annual Planning training who are comfortable articulating clear goals and objectives for their programs."*

<u>Example of an accomplishment:</u> *"Unit/divisional managers received materials and templates for the Annual Planning training."*

Annual Planning Worksheet

<u>Purpose of the worksheet</u>: To record the outputs from the Annual Planning process so that they may be ready to input into *Nuventive.* These completed worksheets do not need to be submitted. For internal use only within the unit/division.

Goals	Objectives	Performance Indicators/Accomplishments
Ex: "Champion the re-engineering of the strategic and annual planning processes."	*Ex: "By Fall 2020, all areas, units/division, and office/programs will have clearly articulated annual goals and objectives."*	*Ex. performance indicator: "Percentage of unit/divisional managers who participated in the Annual Planning training who are comfortable articulating clear goals and objectives for their programs."* *Ex. accomplishment: "Unit/divisional managers received materials and templates for the Annual Planning training."*

Next Steps

Next Steps after this kick-off meeting:

1. IRP will distribute: this presentation, the Annual Planning Guide, a detailed calendar

2. Schedule a technical training meeting to introduce the new Nuventive Improve platform. (1st week of October)

3. Begin thinking through your unit/division annual goals and objectives
   - Use output from summer planning workshops as a starting point
   - Use the Annual Planning Guide as a resource

4. Check-in with your office/programs to ensure they are comfortable with the annual planning process

5. Download Excel budget spreadsheets from Nuventive after 10/9

Thank You

Questions?