

FY2022-23

Annual Planning Kick-off for DEPARTMENTS/PROGRAMS

STUDENTS SERVICES

MARCH 2022

Purpose of Planning

Planning should focus on the top priority: **students' educational achievement.**

The greatest responsibility is to *provide students with the knowledge, skills, learning experiences, and support* so they may be prepared to survive and thrive in a world full of uncertainty, changes, and challenges. (Albrahim, 2020)

Planning permits the institution to **set the stage for change:** for the institution and most importantly for *students*. (Carver, 2020 and Lemoine and Richardson, 2020)

Agenda

- Annual planning process: What has changed?
- Where are we going in 2022-23?
 - Divisional-level annual goals
 - Annual planning worksheet
 - Using data in annual planning
 - Annual planning calendar and next steps

Annual Planning Process

- What has changed?

TracDat: Aspects that Did Not Work Well

- Process revolves around **funding recommendations**.
- **Funding recommendations submitted separately:**
 1. Related recommendations may have not been approved together.
 2. Rationale for the funding recommendations may have been redundant or unclear.
- **Difficult to coordinate activities** due to lack of transparency of recommendations.
- Long TracDat form, but **not all fields are used** for review/prioritization.

For example:

4 separate, but related recommendations in TracDat

Hire two counselors for a new initiative

Hire a new advisor to coordinate workshops for the same initiative

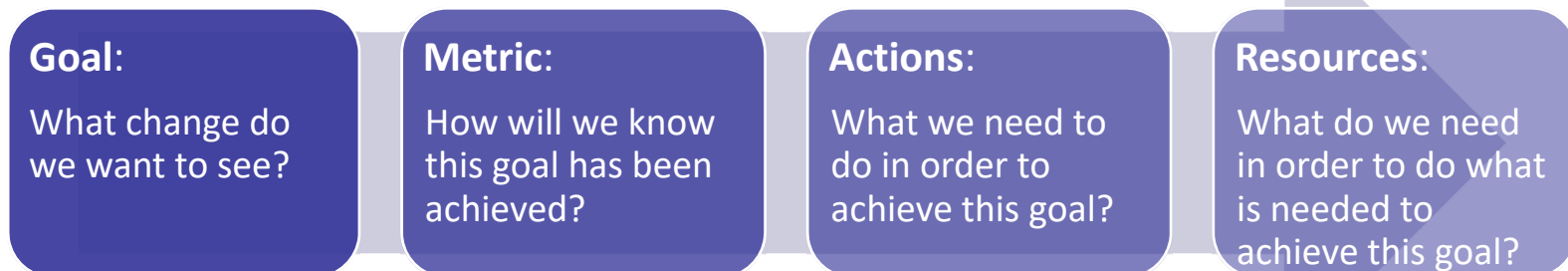
Hire a new coordinator for the same initiative

Request for instructional supplies for the same initiative

New Annual Planning Process

- More focused, coordinated effort.
 - What change do we want to see?
 - Use data to focus efforts on the greatest areas of need.

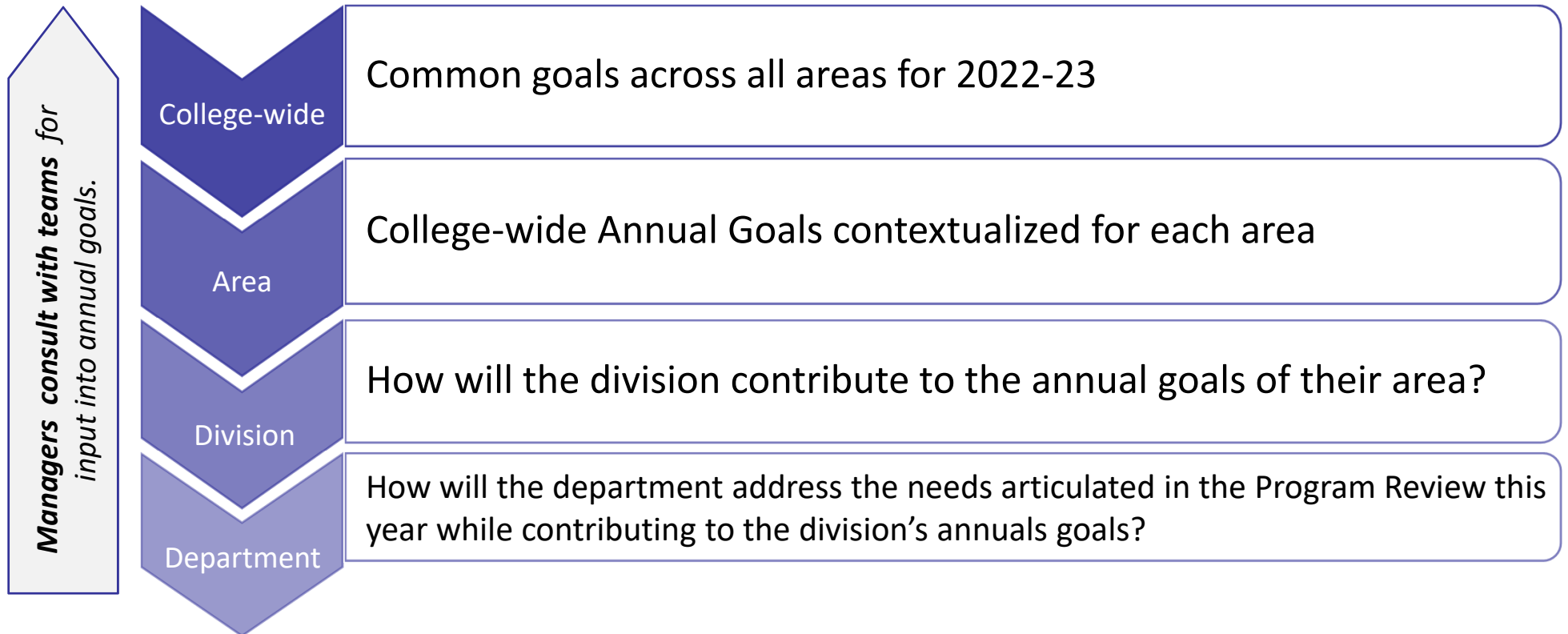
Elements of an Annual Plan:



- **Funding requests are one element of an annual plan.** They should be coordinated to support goals.

Aligning Efforts through Annual Plans

*Cascading goals **to improve coordination***



From TracDat to Nuventive(example)

TracDat

Hire two counselors for a new initiative

Hire a new advisor to coordinate workshops for the same initiative

Hire a new coordinator for the same initiative

Request for instructional supplies for the same initiative



New Annual Planning Process (Nuventive)

Goal: To strengthen the outreach and support services to a specific student population where the data shows an especially large gap in metric X.

Metric: Improve metric X by 15% for this student population.

Action: Expand the services of this initiative to support this specific student population.

Resources needed to accomplish the goal:

Hire two counselors with experience working with this specific student population

Hire a new advisor to work directly with this student population

Hire a new coordinator to work directly with this student population

Request for instructional supplies to support the expansion of this initiative

Where are
we going in
2022-23?

- 2022-23 Divisional Goals
- Annual Planning Worksheet
- Using data in annual planning
- Timeline & Next Steps

Preparing Annual Goals

2022-23 Divisional Goals

- All departments/programs within the same division should be working towards the same 2022-23 Divisional Goals.
- Use the divisional-level annual goals as a starting point when establishing annual goals for the department/program. *How may the department/program contribute to the division's vision for next year?*

- The goals of the division are included as a reference document in Nuventive.

 Nuventive. Improve Analytics

Division Annual Goals

Data Last Updated
3/9/2022 1:03:35 AM

Enrollment Services

Annual Goal Title	Annual Goal Description	Metric	Action
Grow FTES	Focus on new and returning enrollment populations to grow FTES	When FTES starts to improve annually	Expand outreach to identified groups Aid outreach to eligible population
Ease of Entry	Simplify and improve the onboarding, messaging, and matriculation process for all students	When 100% of all new, returning, dual enrolled, and non-credit students can apply, be admitted, and know their next steps through to enrollment within 48 hours.	Audit and track new students through orientation.
Expand Outreach	Strengthen external outreach beyond high school populations to business and industry, adult populations, and dual enrollment	When enrollment grows annually 5% in each identified metric - dual enrollment and adult learners in particular	Expand outreach to identified and Aid messaging in all outreach.

Preparing Annual Goals on Worksheets

Purpose of the worksheets

- To help with brainstorming and internal discussions in the department/program.
- To document annual plans so that they are ready to input into *Nuventive*.
- May be used for discussion with divisional dean.
- Completed worksheets **do not** need to be submitted to IRP.

Annual Planning Worksheet

Goals	Metric	Actions	Resources

Funding Request Worksheet

Funding Request Name	Type of Request	Funding category	Rationale	Does this funding request address a risk?	Does this funding request support this Institutional Annual Priority?	Was this funding request mentioned or derived from the last program review?

Annual Planning Worksheet

Goals	Metric	Actions	Resources
<i>What change do you want to see at the end of this academic year?</i>	<i>A quantitative or qualitative way to measure progress</i>	<i>Description of steps or projects needed in order to achieve a goal</i>	<i>General description/text of the resources needed to execute an action and achieve a goal</i> <i>- Financial or non-financial</i> <i>- Existing and new resources</i>

Best practices for annual goals:

- Informed by division's goals
- Aligned to Program Review
- Aligned to insights from data
- Can be completed in a year
- Focused on changes rather than day-to-day operational activities
- Progress is measurable

Funding Request Worksheet

Funding Request Name	Type of Request	Funding category	Rationale	Does this funding request address a risk?	Does this funding request support this Institutional Annual Priority?	Was this funding request mentioned or derived from the last program review?
<p>Describe the resources needed to complete actions and achieve goals (e.g., how many staff and what they will be doing, software)</p>						

Funding Request Worksheet

Funding Request Name	Type of Request	Funding category	Rationale	Does this funding request address a risk?	Does this funding request support this Institutional Annual Priority?	Was this funding request mentioned or derived from the last program review?

One-time funding

Funding that supports a project occurring during a **specific time period**. Funding may be required for one or more years, although it will not need to continue past a specific date.

Ongoing funding

A request for a **budget augmentation** to the annual operating budget. If approved, the augmentation will **continue indefinitely** into the future.

Equipment replacement cycle

A request to fund **equipment with a specific lifespan** that should be replaced regularly.

Funding Request Worksheet

Funding Request Name	Type of Request	Funding category	Rationale	Does this funding request address a risk?	Does this funding request support this Institutional Annual Priority?	Was this funding request mentioned or derived from the last program review?
<p>Which category most closely describes this funding request?</p> <ul style="list-style-type: none"> • Staffing • Technology/software • Instructional equipment • Non-instructional equipment • Furniture • Facilities • Contracts, services, memberships, travel and conferences 						

Funding Request Worksheet

Funding Request Name	Type of Request	Funding category	Rationale	Does this funding request address a risk?	Does this funding request support this Institutional Annual Priority?	Was this funding request mentioned or derived from the last program review?
Required fields in Nuventive for all requests						
				Not required for all requests. Required for funding requests that support an annual goal.		

Funding Request Worksheet

Funding Request Name	Type of Request	Funding category	Rationale	Does this funding request address a risk?	Does this funding request support this Institutional Annual Priority?	Was this funding request mentioned or derived from the last program review?
<p>YES or NO</p> <p><u>Risk Definition:</u></p> <p>The funding request is fully and directly related to:</p> <ul style="list-style-type: none"> - Eliminating, preventing or reducing a known condition likely to result in harm, injury, illness, exposure, loss of life or destruction of property (health/safety risk) or - the likelihood of a lawsuit, fine, citation or reputational damage against the District (liability risk) 						

Funding Request Worksheet

Funding Request Name	Type of Request	Funding category	Rationale	Does this funding request address a risk?	Does this funding request support this Institutional Annual Priority?	Was this funding request mentioned or derived from the last program review?
<p><u>Annual Priority</u> is a demographic population or condition that the College has identified as the area of focus for the annual planning year.</p> <p>For the 2022-23 academic year, the Annual Priority is <u>Black or African-American students</u>. This student population has been identified as a disproportionality impacted group in 4 out of 7 lagging indicators and in all leading indicators.</p> <p>Does this goal intentionally and directly contribute to the Annual Priority?</p> <p>YES – directly YES – indirectly NO</p>						

Funding Request Worksheet

Funding Request Name	Type of Request	Funding category	Rationale	Does this funding request address a risk?	Does this funding request support this Institutional Annual Priority?	Was this funding request mentioned or derived from the last program review?
						<div>YES</div> <div>NO</div> <div>N/A</div>

Funding Request Worksheet (cont.)

For One-Time or Ongoing Funding Requests:	For Equipment Replacement Cycle Only:	
Amount requested for this annual planning year	Estimated total amount to replace all pieces of this equipment	Estimated number of years one piece of this new equipment will remain in useable condition
	How much is the total cost to replace all quantities of this equipment?	How many years is this new piece of equipment expected to be used before requiring replacement?

Funding Request Review Process

Process to Review Funding Requests Varies by Type of Request

Type of Funding Request	Review Process
Requests related to risk, security or liability	<ul style="list-style-type: none"> - Reviewed by Risk Management to confirm urgency of the risk and the type of risk - Requests forwarded to Fiscal Services as input into the budgeting process
Funding requests under \$5,000	<ul style="list-style-type: none"> - Reviewed and approved by each Area VP
Equipment replacement cycle requests	<ul style="list-style-type: none"> - Reviewed through the budgeting process led by Fiscal Services
Ongoing budget enhancement (increase) for operational needs	<ul style="list-style-type: none"> - Reviewed through the budgeting process led by Fiscal Services
One-time or ongoing funding requests that support an annual goal	<ul style="list-style-type: none"> - Prioritized within each area in a process led by the Area VP. Only high priority requests from each area moves forward. - High priority requests: <ul style="list-style-type: none"> - For technology and facilities funding requests, Technology & Facilities Steering Committee shares observations with PBC - College Council and PBC reviews and recommends to the President - Cabinet reviews and scores using a prioritization rubric - Cabinet approved requests forwarded to Fiscal Services to identify a funding source and for inclusion in the budgeting process.

Executive Cabinet Funding Request Prioritization Rubric

Prioritization Criteria	3 points: High degree of support of the prioritization criteria	2 points: Moderate degree of support of the prioritization criteria	1 point: Low degree of support of the prioritization criteria
Institutional or Area Goals	The request directly impacts all of the goals of the institution or area.	The request directly or indirectly affects at least 50% of the goals of the institution or area	The request directly or indirectly impacts less than 50% of the goals of the institution or area
Annual Priority <i>For the 2022-23 academic year, the College continues to prioritize Black/African-American students as the demographic area of focus. Up to date data shows that this student population is a disproportionality impacted group in 4 out of 7 institutional lagging indicators and in all leading indicators.</i>	The request intentionally impacts the academic progress and/or college experience of Black/African American students	The request addresses some aspect(s) of the academic progress and/or College experience of Black/African American students , however, addressing this annual priority is a secondary outcome of the request	There is no clear connection between the request and its impact on the academic progress or the College experience of Black/African American students
Student Impact	The request directly impacts the institutionalization of Guided Pathways	The request indirectly impacts the institutionalization of Guided Pathways	The request does not support the institutionalization of Guided Pathways
Purpose	The request addresses an institution-level problem or need that has been occurring for multiple years	The request addresses an institution-level problem or need that has been occurring for at least one year or The request addresses a unit/division-level or office/program-level problem or need that has been occurring for multiple years	The request addresses a unit/division-level or office/program-level problem or need that has been occurring for one year or less or The request addresses an institutional-level problem or need that has been occurring for less than one year or The request does not explicitly address a problem or need

Ranking		
High Priority Request	Moderate Priority Request	Low Priority Request
9-12 points	6-8 points	5 or less

Process to Review Funding Requests Varies by Type of Request

Type of Funding Request	Review Process	Is an annual goal required?	Rubric used for review
Requests related to risk, security or liability	<ul style="list-style-type: none"> - Reviewed by Risk Management to confirm urgency of the risk and the type of risk - Requests forwarded to Fiscal Services as input into the budgeting process 	Yes or No <i>(only if request directly supports an annual goal)</i>	No
Funding requests under \$5,000	<ul style="list-style-type: none"> - Reviewed and approved by each Area VP 	Yes or No <i>(only if request directly supports an annual goal)</i>	No
Equipment replacement cycle requests	<ul style="list-style-type: none"> - Reviewed through the budgeting process led by Fiscal Services 	No	No
Ongoing budget augmentation for operational needs	<ul style="list-style-type: none"> - Reviewed through the budgeting process led by Fiscal Services 	No	No
One-time or ongoing funding requests that support an annual goal	<ul style="list-style-type: none"> - Prioritized within each area in a process led by the Area VP. Only high priority requests from each area presented to Cabinet. - All high priority requests from each area scored by Cabinet using a prioritization rubric. - Highest scoring requests from Cabinet forwarded to Fiscal Services to identify a funding source and for inclusion in the budgeting process. 	Yes	Yes

Funding Request Worksheet

Funding Request Name	Type of Request	Funding category	Rationale	Does this funding request address a risk?	Does this funding request support this Institutional Annual Priority?	Was this funding request mentioned or derived from the last program review?
			<i>Short description focused on information needed for the prioritization process.</i>			

Suggestions on how to strengthen the rationale for a funding request:

For **ongoing or one-time requests that support an annual goal**, address the following questions in the rationale:

- How will this funding request support the annual goals of the division and/or program?
- If applicable, what rationale for the funding request was provided in the last program review? (Refer to the text from program review)
- If applicable, how does the funding request support the institutionalization of Guided Pathways?
- If applicable, what problem or need does this funding request help resolve? Who is impacted by this problem (entire College, specific division or program)? How long has this problem/need been occurring?

For **equipment replacement cycle requests**, include in the rationale:

- What is the current status on the equipment?

Using Data in Annual Planning

Why Data matters in Planning?

- *Data informs annual goals.* Data provides insight into what changes are needed to create greater impact.
- *Data tracks progress.* Data serves to guide us on what worked and what did not work.

Sources to inform annual planning:

- Program Review document
- Student Services Dashboard
- Other IRP dashboards

Program Review

Refer to the following sections from the last Program Review document

- *Program Overview*: What major challenges did the program confront in the last four years? What groups of students need to be a priority during the next four years?
- *Program Assessment*: Using the data sources selected, review and list equity gaps within the program's data. Focus on examining student data by race/ethnicity in order to dismantle racism on campus.
- *Service Area Outcomes Assessment*: To what extent SAOs were designed to focus on students in the program with the greatest needs?

Use the analysis and recommendations from the Program Review as the starting point for further analysis. The Program Review includes goals and data analysis for the next four years. What aspect of the goals for the next four years should the department/program focus on in the next year?

Student Services Dashboard



Student Services Dashboard

Winter 2018 - Fall 2021

[Created by IRP](#)

Filters

Select multiple cohorts by holding CTRL key.
If no cohorts are selected
data will represent all ECC students.

Cohort Code and Description

Search

- ☐ Select all
- ☐ - Not in Cohort
- ☐ AEP - Adult Education Program
- ☐ AMBA - Baseball
- ☐ AMBB - Men's Basketball
- ☐ AMCC - Men's Cross Country
- ☐ AMFB - Football
- ☐ AMGO - Men's Golf
- ☐ AMSB - Softball
- ☐ AMSO - Men's Soccer
- ☐ AMSW - Men's Swimming
- ☐ AMTE - Men's Tennis
- ☐ AMTO - Men's Track and Field
- ☐ AMVB - Men's Volleyball
- ☐ AMWP - Men's Water Polo
- ☐ ASCA ASCA MECA

South Bay Promise

- ☐ South Bay Promise
- ☐ Not in SBP

Clear All Filters



Selected Cohort(s)

All ECC Students

Selected Term(s)

All Terms

Dashboard Pages

Select

Demographics

Demographics Tables

Unit Load

Term GPA

Success & Completion by
Race/Ethnicity

Success Tables

Retention by Race/Ethnicity

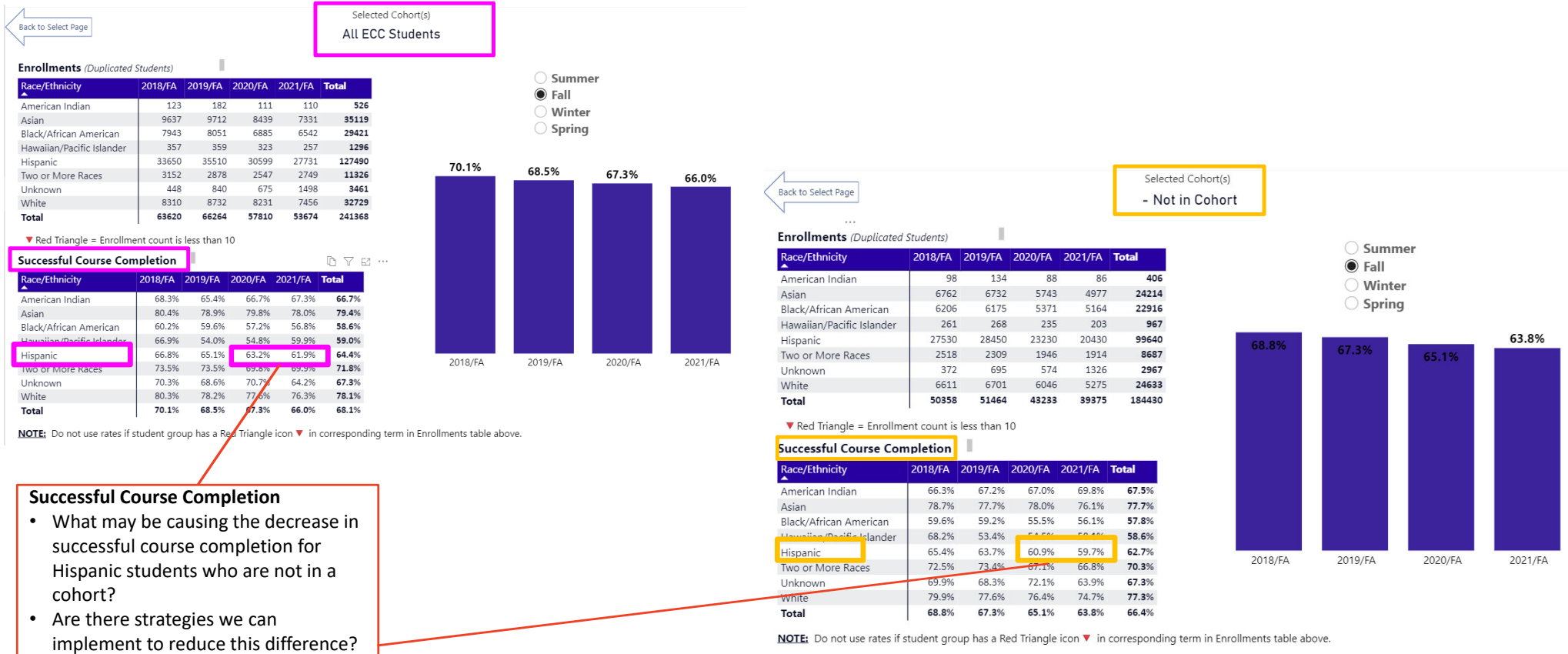
Awards

Transfers

Data source: Colleague

Updated every January and July

Identifying Gaps: Not in Cohort Example



Timeline & Next Steps

2022-23 Annual Planning & Budgeting Calendar

ANNUAL PLANNING PHASE	SEPT	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUNE	JULY	AUG	SEPT
Areas review College-wide annual goals and determine area-level goals		By mid-Oct											
Divisions develop annual plans			By end of February				Revise divisional plans if needed based on input from the departments						
Departments develop annual plans							By April 15th						
Prioritization of budget requests within Divisions and Areas								By end of May					
Prioritization of budget request with Cabinet										June			
Identify funding source for high priority budget requests										June - July			
Approve budget requests												Aug - Sept	
Final budget approved													9/15

Next Steps

- **Draft annual plans for department/program**
 - Complete Excel worksheet for annual planning and funding requests to be ready to input into Nuventive.
 - For a step-by-step guide for developing annual plans, please refer to the Annual Planning Guide.
- **Input annual plans in Nuventive**
 - Assign someone in your department/program to input data into Nuventive. Have this representative attend **Nuventive training on April 1st**.
 - Input from all Divisions and Departments **due in Nuventive by April 15th** . Review & prioritization of funding requests will be based on input received in Nuventive.

Contact for Support

Contact for questions related to Nuventive access & support: Diora Hong
(dhong@elcamino.edu)

Contact for questions related to annual planning process: Grace Ou
(gou@elcamino.edu)



Thank You
Questions?

Nuventive Overview

LOGGING IN AND ACCESSING ANNUAL PLANNING RESOURCES

Nuventive Overview

The following slides are to provide access to the resources in Nuventive to develop annual plans.

These plans should first be drafted and documented in the Annual Planning worksheet (Excel document) so the contents will be ready to input into Nuventive.

A more extensive technical training for Nuventive will be held on April 1st. The following slides will not cover how to enter annual goals and funding requests into Nuventive.

Logging in

<https://solutions.nuventive.com/>



Logging in

Enter your ECC credentials when prompted.



EL CAMINO COLLEGE

Sign in with your ECC email account

Sign in

- [Forgot My Password](#)
- [Change My Password](#)
- [What's My Username?](#)
- [Troubleshooting MyECC](#)
- [Login and password help](#)
- [Chat with us Live](#)

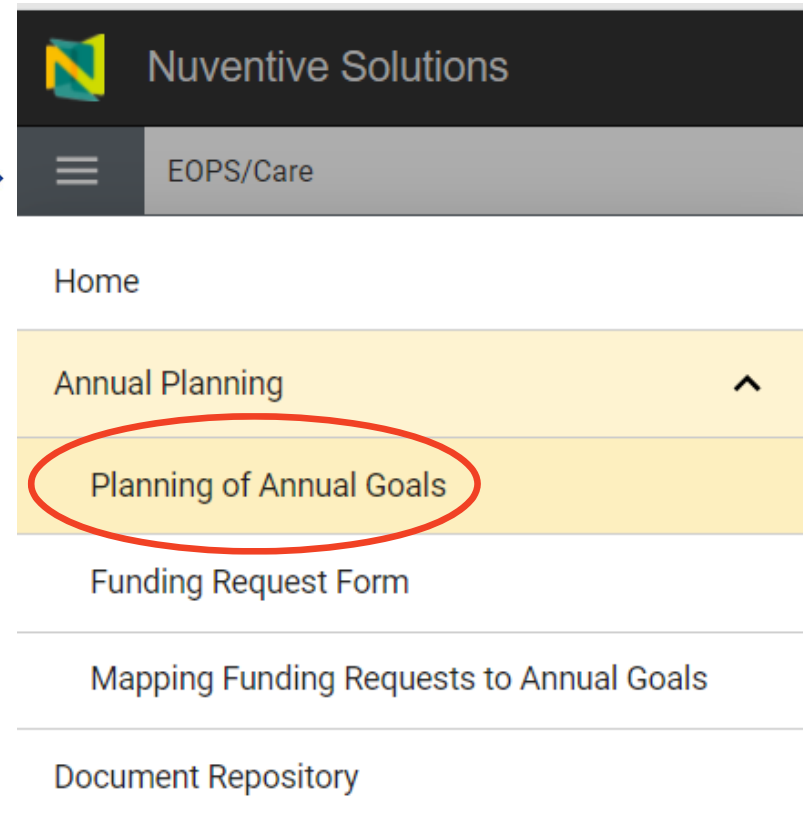
Select Your Program Name

Use the dropdown arrow to select your program:

The screenshot displays the Nuventive Solutions interface. At the top, the header includes the Nuventive logo, the text "Nuventive Solutions", and "Nuventive Improvement Platform Essential Edition". On the right, it says "Welcome, vunda@elcamino.edu!". A red circle highlights a dropdown arrow in the top right corner. On the left, a sidebar menu is visible with a red circle around the "EOPS/Care" option. The main content area shows a list of programs under the "EOPS/Care" header, including "Annual Planning and Program Review (NSC) - Chemistry", "Annual Planning and Program Review (NSC) - Earth Science/Geography", "Annual Planning and Program Review (NSC) - Life Science for Allied Health", "Annual Planning and Program Review (NSC) - Physics", "Bookstore & Food Services", "CalWORKs", "Campus Police", "Career Pathways", "Community Advancement", "Community Education", "Contract Education", "Counseling & Student Success", "Enrollment Services", and "EOPS/Care" (highlighted in yellow). On the right side, there are two dashboard widgets: "ECC Annual Planning Dashboard" and "Fall Course Completion Dashboard".

Access to Data Dashboards and Resources

Click on the hamburger to get to the Home screen



Click on Planning of Annual Goals



Access to Data Dashboards and Resources

All resources and data dashboards will be on the right-hand bar of the Annual Goals form

The screenshot displays the Nuventive Improvement Platform Essential Edition interface. The main section is titled "Annual Planning" and includes a search bar, filters for "Annual Goal Status" and "Annual Planning Year(s)", and a message stating "No Annual Goal has/have been entered. Please click the add button + to create a/n Annual Goal". The right-hand sidebar contains several data dashboards and resources, including "Spring Course Completion Dashb...", "Adult Education Dashboard", "Student Services Metrics Tool", "Fall 2021 Withdrawal Survey: Results Preview", and "Division Annual Planning Goals". A red box highlights the "Division Annual Planning Goals" dashboard, and a callout box points to it with the text: "If your division has established divisional-level goals, refer to the 'Division Annual Planning Goals' document".

Nuventive Solutions
Nuventive Improvement Platform Essential Edition
Welcome, vunda@elcamino.edu!

EOPS/Care

Annual Planning > Planning of Annual Goals

Annual Planning

Search by Key

Annual Goal Status: View All

Annual Planning Year(s): View All

Is a budget augmentation needed to support this goal?: View All

Showing 0 of 0

To add an annual goal, please click the green plus icon and complete the form. To edit an existing goal, click the three dots on the far right of the goal name and select "Open."

Refer to the Annual Planning Guide (document provided on the right) to develop new annual goals for your division/unit or office/program.

Note: * indicates a required field.

No Annual Goal has/have been entered. Please click the add button + to create a/n Annual Goal

Spring Course Completion Dashb...

Adult Education Dashboard

Student Services Metrics Tool

Fall 2021 Withdrawal Survey: Results Preview

Fall 2021 Withdrawal Survey Previe...

Division Annual Planning Goals

If your division has established divisional-level goals, refer to the "Division Annual Planning Goals" document

Data Dashboards and Documents on the Side Bar

To enlarge the viewing space for the data dashboards and documents on the right-hand side bar, click on viewing options on the top

Sandbox - Annual Planning

Annual Planning > Planning of Annual Goals Close Save

Understanding and Minimizing Withdrawals

ANNUAL GOAL

Annual Goal Title *
Understanding and Minimizing Withdrawals

Annual Goal Description *
Test Goal Description

Annual Goal Status *
Active

Annual Planning Year(s) *
2022-2023

If applicable, how was this goal informed by data?
Withdrawals Survey Report indicates....

Dashboards for Annual Planning

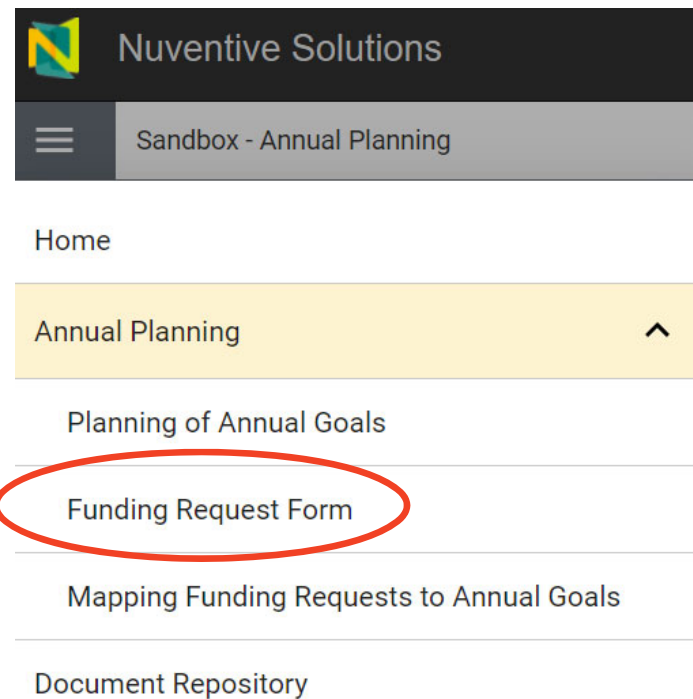
Student Services Metrics Tool

Fall 2021 Withdrawal Survey: Results Preview
JANUARY 2022

Fall 2021 Withdraw Survey Previe...

Historical records from TracDat

Click on the
hamburger to get
to the Home
screen.



Click on Funding
Request Form



Historical records from TracDat

All historical records from TracDat (the older version of Nuventive) are available in a Excel document to the right of the 'Funding Request Form'.

This includes:

- All funding recommendations/ requests from previous years
- Completed Program Review documents from previous years

Note: After clicking on this document, it may be slow to load since there is a lot of information included.

Nuventive Solutions
Nuventive Improvement Platform Essential Edition
Welcome, vund

EOPS/Care

Annual Planning > Funding Request Form

Funding Request

Search by Keys

Funding Category View All

Annual Planning Year View All

Funding request approved View All

Showing 0 of 0

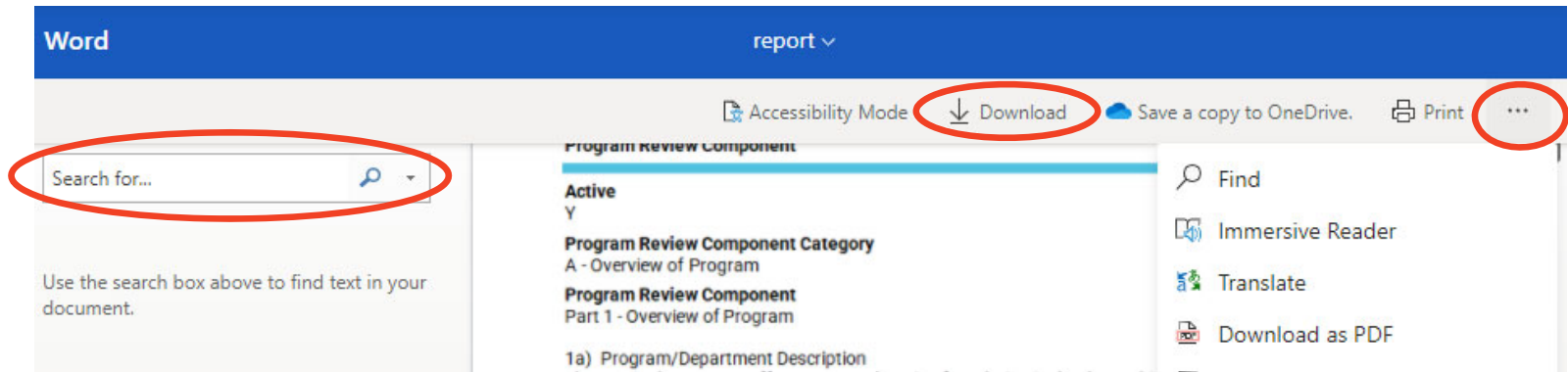
Please complete the following form for each request for additional funding above and beyond current funding allocations. Note: * indicates a required field.

After completing this funding request form, please map funding requests to an annual goal. Funding requests that have not been mapped to an annual goal will be categorized under "operational need" and reviewed separately..

No Funding Request has/have been entered. Please click the add button + to create a/n Funding Request

El Camino College
Planning & Program Review Recommendations
Historical Recommendations (pri...

Historical records from TracDat



When the document opens, either **download** the document OR click on the three dots (...) on the right and select **Find** to search for key words.