

FY2022-23 Annual Planning
NEW Nuventive Improve
Training

APRIL 1, 2022

Purpose of this meeting

To provide an overview of:

- How to navigate the Nuventive Annual Planning module
- How to copy annual plans from the Annual Planning worksheet into Nuventive.

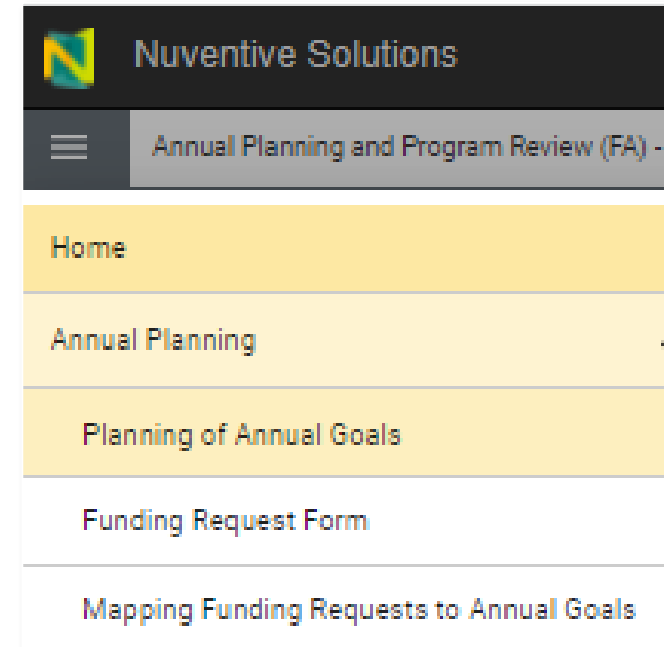
This training will NOT cover how to analyze data and develop annual goals, etc.

Content questions in weekly office hours:

Wednesdays 1:30-2pm & Thursdays 3-4pm

Agenda

- How to log-into Nuventive
- Entering Goals & Navigating Nuventive
- Entering Funding Requests
- Mapping Funding Requests to Annual Goals



Worksheets

To prepare to enter annual plans into Nuventive, it is recommended to go through the Annual Planning Worksheets first. This includes all of the questions required in Nuventive.

[Link to download the Annual Planning Worksheet](#)

Other resources to help prepare Annual Plans and complete the Annual Planning Worksheets: [Annual Planning Website](#)

Worksheet

Annual Planning Worksheet for input into “Planning of Annual Goals” form:

Goal Title	
Goal Description	
Goal Status	<SELECT>
Data sources used to formulate the goal	
Metric	
Actions	
Resources	
Budget Augmentation Need	<select>

Funding Request Worksheet for input into “Funding Request Form”:

Funding Request Description	
Type of Request	<select>
Funding category	<select>
Rationale	
Amount requested	
Total amount to replace all pieces of this equipment	
Number of usable years	
Goal Title	
Does this funding request address a risk?	<select>
Does this funding request support the Institutional Annual Priority?	<select>
Was this funding request mentioned or derived from the last program review?	<select>

Nuventive Access & Log-in

Logging in with URL

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



Nuventive Solutions

Sign in



Nuventive™

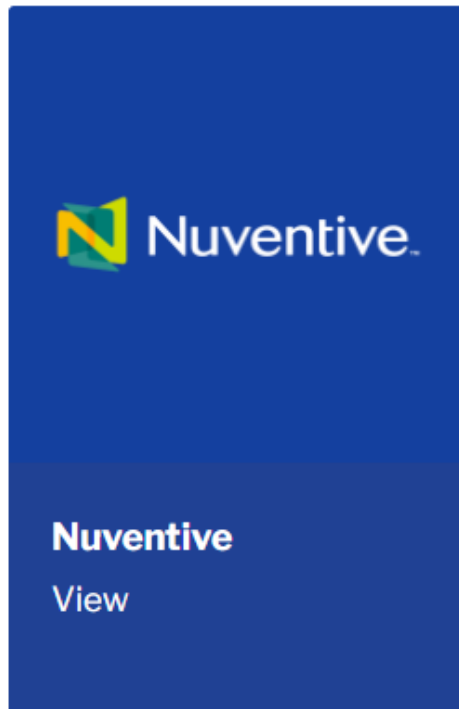
Achieve. Improve. Adapt.

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Privacy Policy

Logging in through IRP website

The log-in link can also be found in the [IRP website](#) . Click on the Nuventive button below for quick access to the New Nuventive Improve link.



Nuventive Access

Nuventive is the online planning platform where annual goals, actions, metrics and resource requests are documented, mapped and tracked.

Goals should cascade first from the institution to all areas, then to all divisions/units, and finally to all offices/programs. The relationships between these goals can be documented and mapped within Nuventive. Any new budget request can also be documented in Nuventive and mapped to a goal to inform the review and approval of budget requests.

For the 2021-22 annual planning and budgeting process, ECC introduced a new version of Nuventive. The new *Nuventive Improve* platform will facilitate the tracking of goals, metrics, actions and the mapping of resource requests to goals. This will allow greater transparency and alignment of the priorities across all ECC entities. It will also more clearly connect the annual planning and budgeting processes.

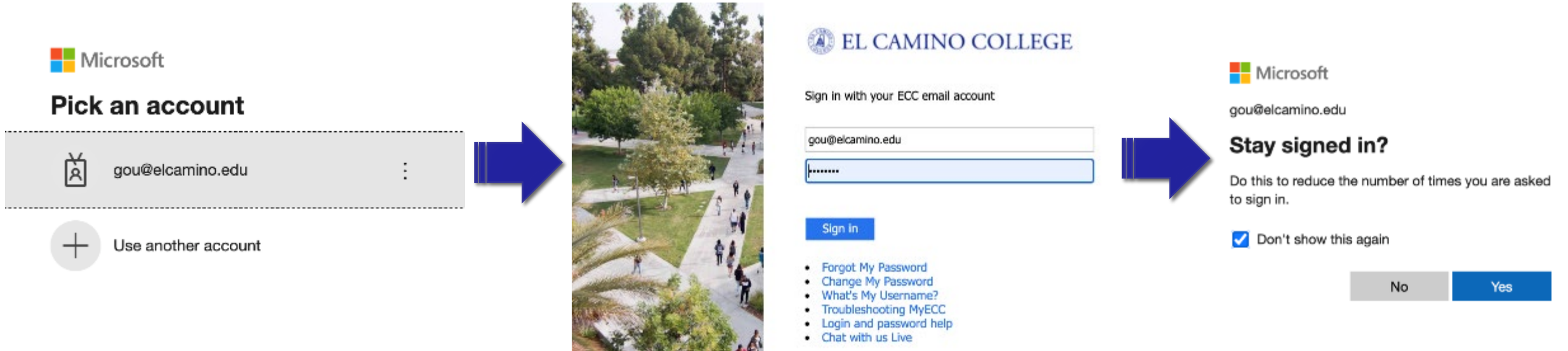
All areas will use new *Nuventive Improve* platform for the 2022-23 planning process which began in October 2021.

To access Nuventive:

- [Link to NEW Nuventive Improve](#)

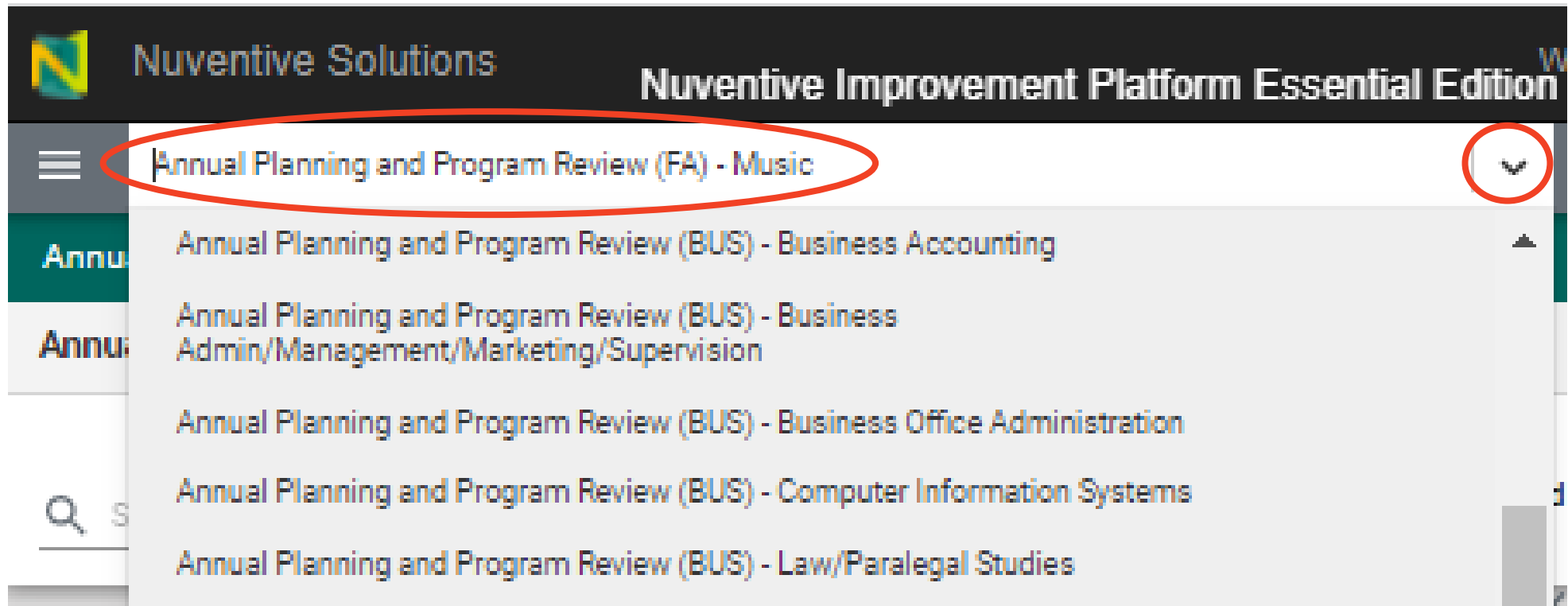
Logging in

Use your ECC credentials to log-in. Click on “Don’t show this again” to stay logged into Nuventive in the future.



Select Your Office or Program Name

Select your office or program name by either typing in the name or by clicking the dropdown arrow to view the list.

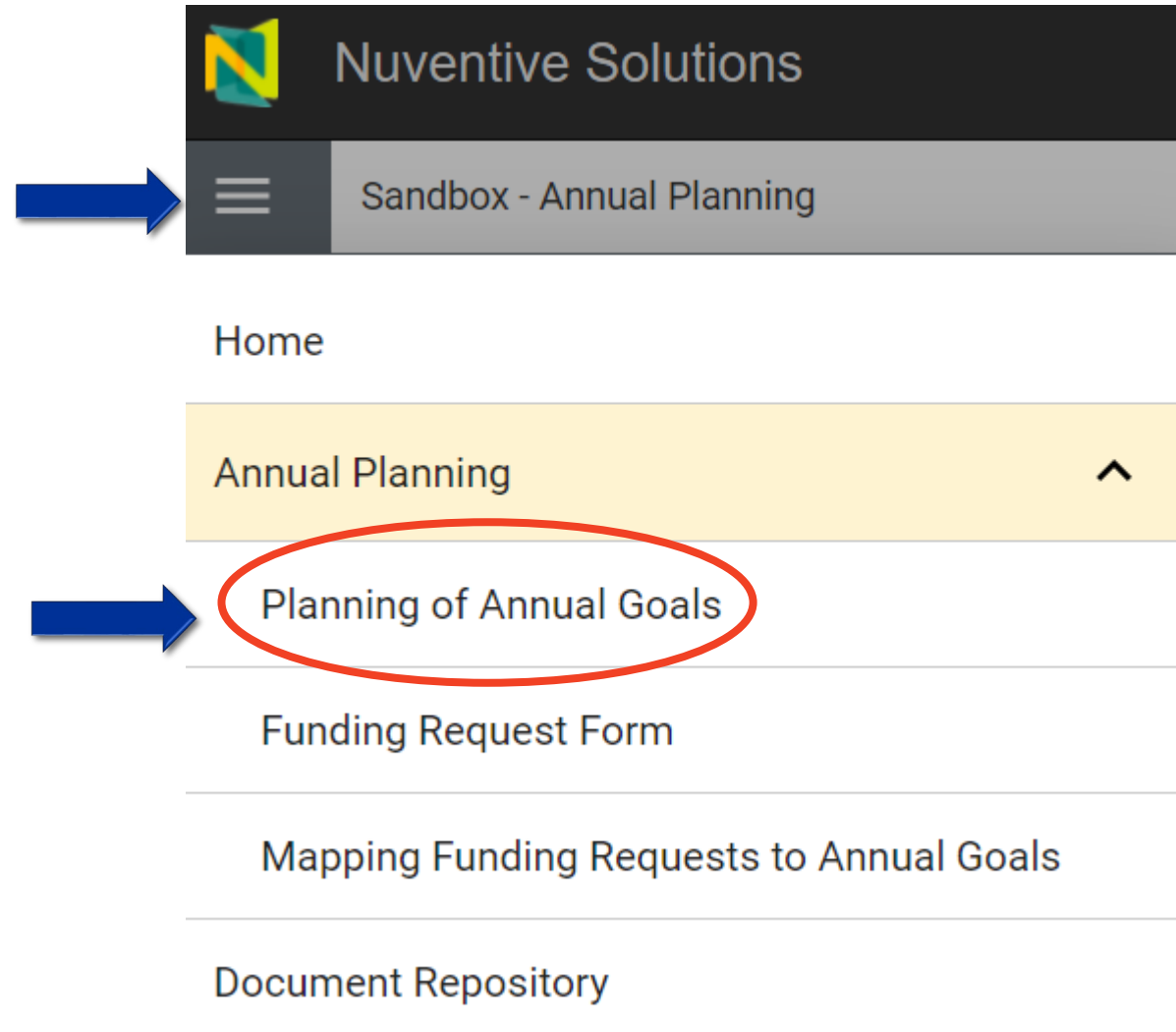


Entering Goals

Nuventive Menu


Click on the hamburger to get to the Home screen.

Click on **Planning of Annual Goals** to start entering your goal(s).



Entering Goals

Click  to add a goal.

 to create a/n Annual Goal'. Two plus icons are circled in red: one in the top right corner and one in the bottom message."/>

Institutional Research and Planning

Annual Planning

Annual Planning

Search by Keyword

Annual Goal Status View All


Annual Planning Year(s) View All

Are additional funds needed to support this goal? View All

Showing 0 of 0

Please complete the following form for each of your annual goals. Refer to the Annual Planning Guide (document provided on the right) to develop new annual goals for your division/unit or office/program. X

Note: * indicates a required field.

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


Entering Goals

☰ Institutional Research and Planning

Annual Planning

New Annual Goal

■ ANNUAL GOAL

Annual Goal Title *  * Indicates a required field

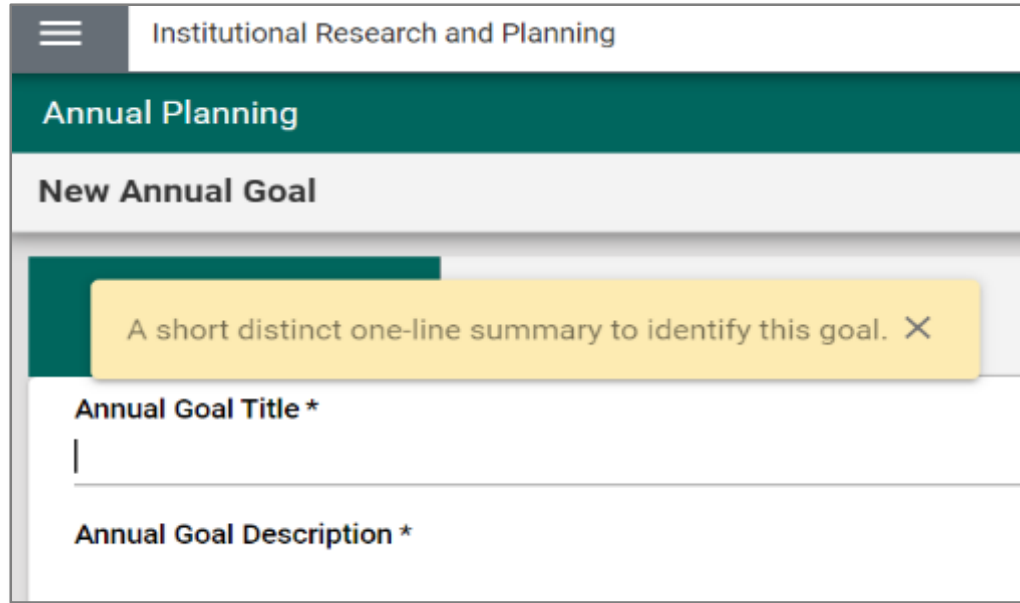
Annual Goal Description *

Annual Goal Status *

Annual Planning Year(s) *

If applicable, how was this goal informed by data?

Entering Goals



Institutional Research and Planning

Annual Planning

New Annual Goal


A short distinct one-line summary to identify this goal. ✕

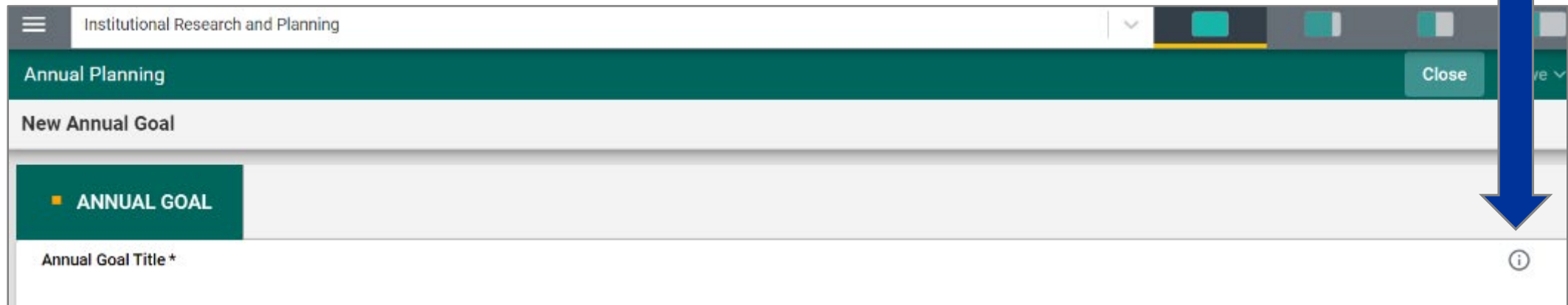
Annual Goal Title *

Annual Goal Description *

A description will appear the first time you click in the field.

Click "x" to hide the description box.

To access the description again, click on the .




Institutional Research and Planning

Annual Planning

New Annual Goal

ANNUAL GOAL

Annual Goal Title *



Entering Goals

Annual Planning Worksheet (Word)

■ ANNUAL GOAL

Annual Goal Title *

Annual Goal Description *

Annual Goal Status *

v

Annual Planning Year(s) *

If applicable, how was this goal informed by data?

For academic programs, how was your goal informed by last year's program SLO assessment results?

Goal Title	Goal Description	Goal Status
<i>A short distinct one-line summary to identify this goal.</i>	<i>A goal is a statement that describes the change needed beyond the status quo for greater efficiency, effectiveness, and impact. Goal statements may start with verbs such as: improve, increase, enhance, strengthen, grow, etc.</i>	<ul style="list-style-type: none"> · Active – work on this goal is still in progress. · Not Started – goal will be implemented in the future, but work has not started yet.

Data sources used to formulate the goal

Note the data sources used to inform the creation of this goal. Prepare screenshots if applicable.

Annual Planning Year = 2022-23

Data or SLO assessment: Text description to help provide context/background to the goal.

Entering Goals

Annual Planning Worksheet (Word)

Metric: How will we know when the goal has been achieved? *

Action(s) needed to complete this goal

Resources needed to complete this action(s)

Is a budget augmentation needed to support this goal? *

Yes or No

Enter funding request in separate form.

Metric	Actions
<i>How will we know when the goal has been achieved?</i>	<i>Description of the steps or projects needed to achieve a goal. One goal can have one or more than one action.</i>
	Resources
	<i>A general text description of the resources needed to execute the actions and to achieve the goal. This could be financial</i>

Reviewing Goals

As goals are entered:

- One “card” per goal
- Filters used to view goal cards and hide old cards.

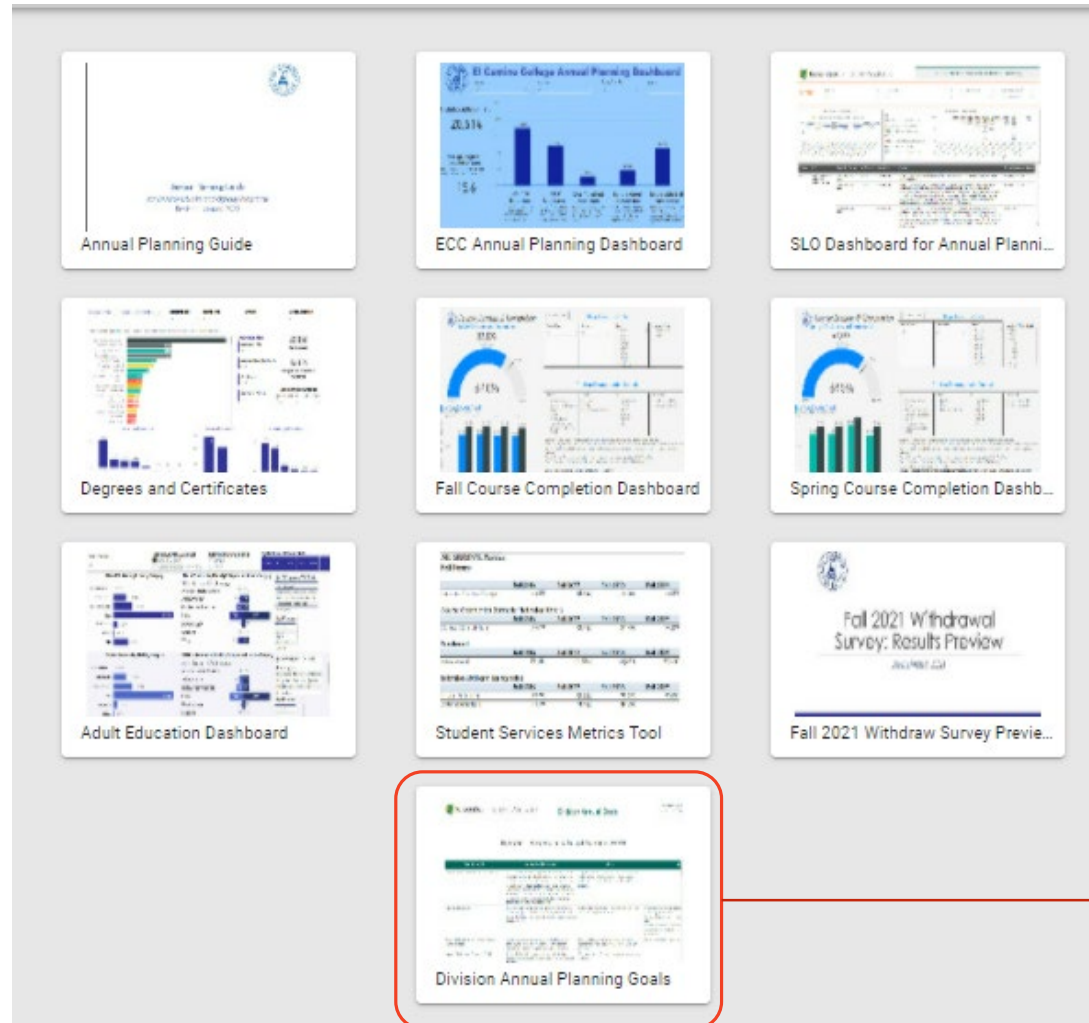
Annual Goal Status View All ▼	Annual Planning Year(s) View All ▼	Is a budget augmentation needed to support this goal? View All ▼
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Filtering functionality will be more helpful in the future, as goals are completed and after more than one annual planning year.

Use Resources on Right
Side-bar to Support Goal(s)

Access to Data Dashboards and Resources

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



Divisional-level Goals:

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

For Administrative Services, HR, President's Office: Annual Plans from 2021-22

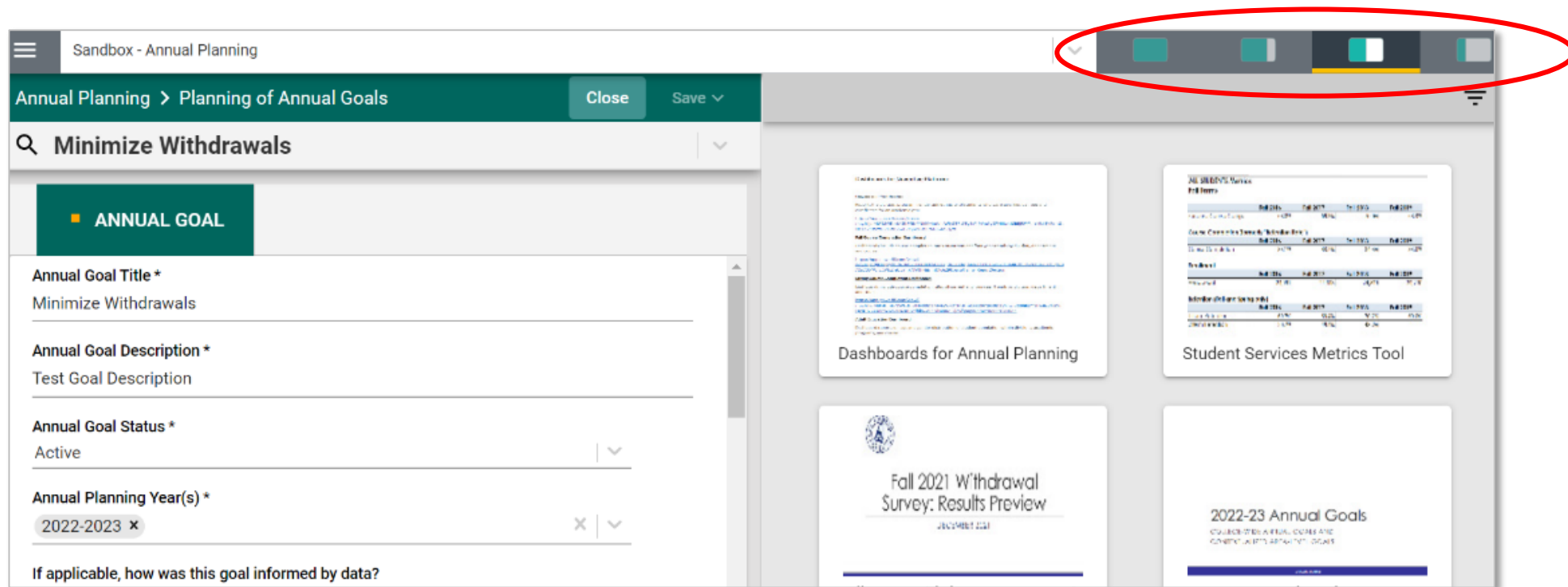
2021-22 Annual Plans entered into Nuventive last year will be on the right-hand bar of the Annual Goals form.

“Annual Planning Goals Report”

The screenshot shows the 'Annual Planning' interface in the Institutional Research and Planning system. The left sidebar contains the 'Annual Planning' form with a search bar and filters for 'Annual Goal Status', 'Annual Planning Year(s)', and 'Is a budget augmentation needed to support this goal?'. The main content area displays a grid of various dashboards and reports, including 'Annual Planning Guide', 'ECC Annual Planning Dashboard', 'Degrees and Certificates', 'Time to Completion Dashboard', 'Fall Course Completion Dashboard', 'Winter Course Completion Dash...', 'Spring Course Completion Dash...', 'Summer Course Completion Das...', 'Career Education Dashboard', 'Academic Program Review Dash...', 'Fall 2021 Withdrawal Survey: Results Preview', 'Student Services Dashboard', 'Student Services Metrics Tool', 'Annual Planning Goals Report' (highlighted with a red box), and 'Division Annual Planning Goals'. A red arrow points from the text on the left to the highlighted report.

Data 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



Data and Documents

Download or print documents by clicking on the appropriate icons.

The screenshot displays a web application interface. On the left, a form titled 'Minimize Withdrawals' is shown under the 'ANNUAL GOAL' section. The form fields include:

- Annual Goal Title ***: Minimize Withdrawals
- Annual Goal Description ***: Test Goal Description
- Annual Goal Status ***: Active
- Annual Planning Year(s) ***: 2022-2023

On the right, a document preview is displayed. The document title is 'Fall 2021 Withdrawal Survey: Results Preview' and the date is 'DECEMBER 2021'. The El Camino College logo is visible in the top left corner of the document. The browser's toolbar shows a download icon and a print icon, both of which are circled in red, indicating the instructions to click on these icons to download or print the document.

Add screenshots of data to inform goal(s)

Add screenshots in this space and related comments to further support your goal(s).



If applicable, please provide screen shots to help other stakeholders understand how this goal was informed by data.

Please paste any examples of data used to inform this goal here.

← → | Normal | **B** *I* U | A | 11

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Saving Your Annual Plan

Saving Goals

New Annual Planning > Planning of Annual Goals

Close Save ▾

Test Goal

ANNUAL GOAL

Annual Goal Title *
Test Goal

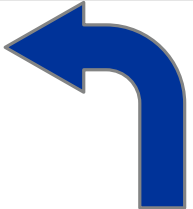
Annual Goal Description *
Test goal description

Annual Goal Status *
Active

Annual Planning Year(s) *
2022-2023

Save & Add New

Save & Close



The Save function only works when all required fields (indicated with *) have been completed.

Saving Goals

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

Sandbox - Annual Planning

Annual Planning > Planning of Annual Goals

Annual Planning +

Search by Keyword Annual Goal Status View All Annual Planning Year(s) 2022-2023 x Is a budget augmentation needed to support this goal? View All Showing 4 of 4

Please complete the following form for each of your annual goals. 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.

Objective successfully inserted. X

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

Sandbox - Annual Planning

Annual Planning > Planning of Annual Goals

Annual Planning +

Objective successfully updated. X

Funding Request Form

Budget Augmentation *(from Planning of Annual Goals Form)*

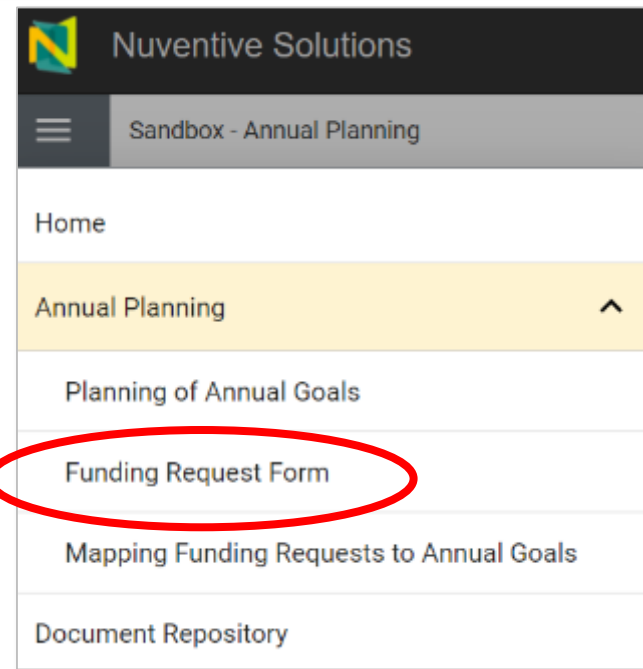
R
T
If a budget augmentation (i.e., an increase to the current total annual budget) is needed to support this goal, please complete a "Funding Request" form."

Is a budget augmentation needed to support this goal? *

Yes

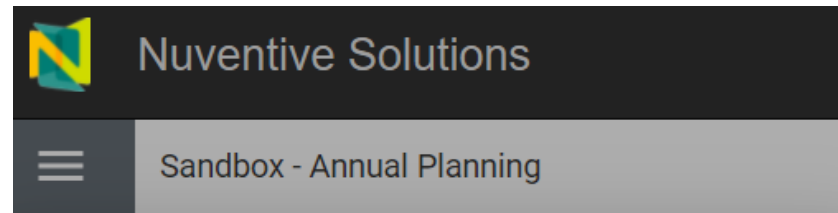
If you select "yes" to the Budget Augmentation question, you will need to complete a **Funding Request Form**.

Be sure to save **Planning of Annual Goals** page first before you access the **Funding Request Form**.

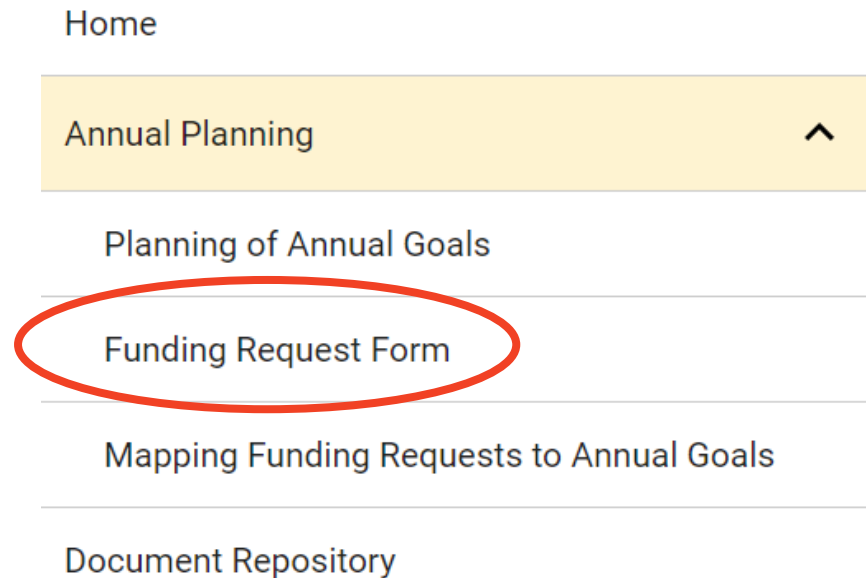


Funding Request Form

Click on the hamburger to get to the Home screen.



Click on **Funding Request Form**



For Academic Affairs & Student Services: Historical records from TracDat

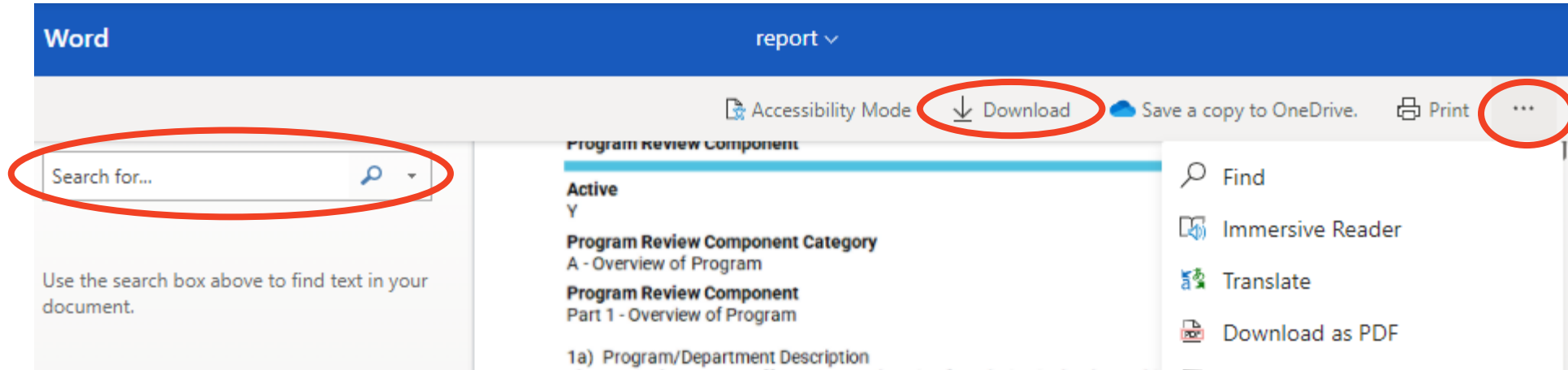
All Funding Recommendations and Program Review recommendations from previous years are available as a PDF to the right of the “Funding Request Form”

The screenshot shows a web application interface for 'Annual Planning and Program Review (HSA) - Kinesiology'. The main content area is titled 'New Funding Request' and contains a form with the following fields:

- Annual Planning Year *
- Type of Funding Request *
- Funding Category *
- Funding Request Description *
- Rationale for funding request
- Does this funding request directly address a critical risk?
- Does this funding request support the College-wide Annual Priority?
- If applicable, was this funding request mentioned or derived from the last program review?

On the right side of the form, there is a sidebar with a PDF link titled 'Historical Recommendations (pri...)' which is highlighted with a red box. The sidebar also displays the El Camino College logo and the text 'Planning & Program Review Recommendations'.

For Academic Affairs & Student Services: Historical records from TracDat



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

Funding Request Form

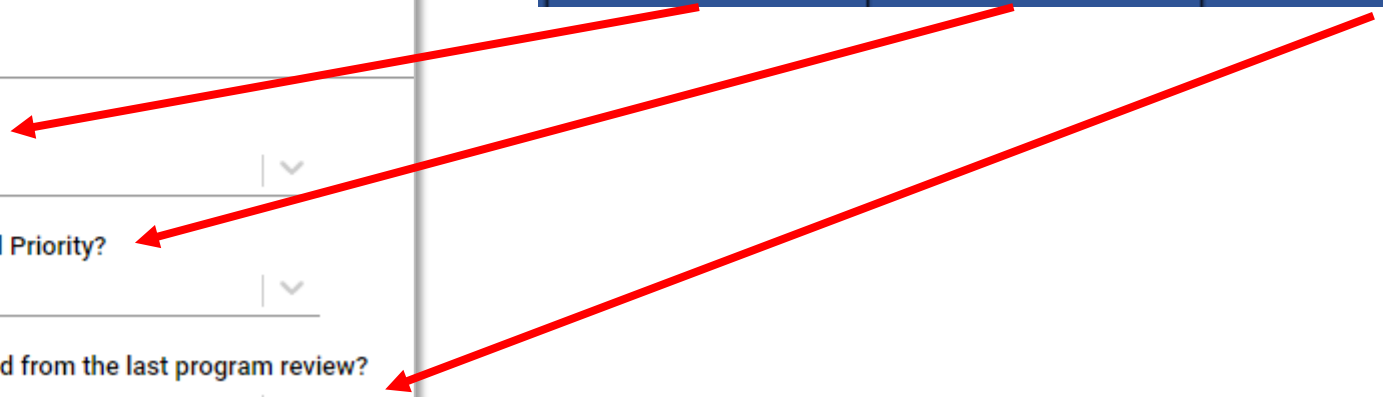
FUNDING REQUEST	MAPPING		
Annual Planning Year *			
Type of Funding Request *	Funding Request	Type of Request	
Funding Category *		Funding category	Rationale
Funding Request Description *			
Rationale for funding request			
Does this funding request directly address a critical risk?			
Does this funding request support the College-wide Annual Priority?			
If applicable, was this funding request mentioned or derived from the last program review?			

If a request requires more than one funding category (e.g., software and staff to implement the new software), please complete one form for each funding category.

Funding Request Form

FUNDING REQUEST	MAPPING
Annual Planning Year *	▼
Type of Funding Request *	▼
Funding Category *	▼
Funding Request Description *	
Rationale for funding request	
Does this funding request directly address a critical risk?	▼
Does this funding request support the College-wide Annual Priority?	▼
If applicable, was this funding request mentioned or derived from the last program review?	▼

Does this funding request address a risk?	Does this funding request support the Institutional Annual Priority?	Was this funding request mentioned in the last program review?
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Funding Request Form

For one-time or ongoing requests:

Amount requested for this annual planning year

For equipment replacement cycle requests only:

Estimated total amount to replace all pieces of this equipment.

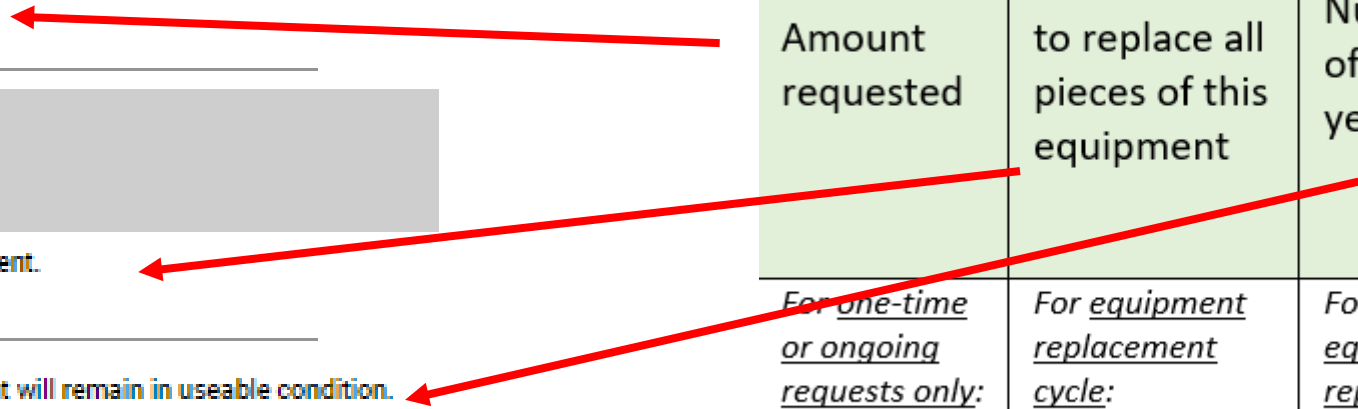
Estimated number of years one piece of this new equipment will remain in useable condition.

For Manager Use Only

Funding request approved

Funding request review – comments

Amount requested	Total amount to replace all pieces of this equipment	Number of usable years
<i>For one-time or ongoing requests only: Amount requested for</i>	<i>For equipment replacement cycle: How much is the total cost to</i>	<i>For equipment replacement cycle: How many</i>



Leave the “For Manager Use Only” section blank. This will be used to communicate approval status at the end of the budgeting process.

Funding Request Form

Note to enter ***numbers only*** for the Amount Requested.



REQUIRED FIELD FOR ONE-TIME OR ONGOING FUNDING REQUESTS: X

Please enter numbers only - no text.

For ongoing requests, please specify how much is needed for the budget augmentation.

For one-time requests that may last more than one year, please specify how much will be needed for each subsequent year in the rationale.

Amount requested for this annual planning year

65,000

Funding Request Form

Annual Planning > Funding Request Form Close Save ▾

🔍 Outreach staff member

FUNDING REQUEST | MAPPING

Funding Request Name *
Full-time outreach staff member

Annual Planning Year *
2022-23 ▾

Amount Requested *
55,000

Funding Category *
Staffing ▾

Save & Add New
← Save & Close

* Indicates a required field. Be sure to complete all required fields before saving.

Reviewing Funding Requests

As funding requests are entered:

- One “card” per funding request
- Filters used to view funding request cards and hide old cards.

Funding Category	Annual Planning Year	Funding request approved
View All	View All	View All

Filtering functionality will be more helpful in the future, as funding requests are approved and after more than one annual planning year.

Mapping of Funding Requests to Annual Goals

Mapping Funding Requests to Goals

- Only applies to Funding Requests that support an Annual Goal.
- Not needed for Funding Requests for Operational Needs.

Purpose of mapping: To use the annual goal to provide context and insight to the rationale for the funding request, if applicable.

One funding request may be mapped to more than one goal.

Mapping Funding Requests to Goals

Annual Planning > Funding Request Form

🔍 Full-time Clerical Assistant

■ FUNDING REQUEST MAPPING

Annual Planning Year *
2022-23

Click on Mapping to link each Funding Request to a goal(s).

Mapping Funding Requests to Goals

The Funding Request Worksheet will identify which annual goal should be mapped to the funding request.

Funding Request

Goal

Funding Request	Type of Request	Funding category	Rationale	Amount requested	Total amount to replace all pieces of this equipment	Number of usable years	Goal Title	Does this funding request address a risk?	Does this funding request support the Institutional Annual Priority?	Was this funding request mentioned in the last program review?
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Mapping Funding Requests to Goals

Click on the “L” (button) to link the funding request to the goal(s) that apply.

A button highlighted in Yellow indicates the funding request is linked to the goal on the left.

If it applies, a funding request may be linked to multiple annual goals.

Annual Planning > Funding Request Form Close Save

Full-time outreach staff member

To link a funding request to an annual goal(s), click on the "L" in the corresponding cell to highlight in yellow (once a button is highlighted in yellow, it indicates the funding request is linked to the goal on the left). Please be sure to click "Save" at the top right before exiting the screen.
(Note: do not use the Notes function available to the far right of your screen).

FUNDING REQUEST **MAPPING**

Annual Planning Goals ▼ **Funding Request** + ⋮
Linked

Search by Keyword	Full-time outreach s...	
Minimize Withdrawals	L	Do Not Use + Add/Edit Note
ACDA conference attendance by ECC Dance program faculty and staff	L	

Next Steps & Resources

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

All Annual Plans and Funding Requests in Nuventive by April 15th

Annual Planning Resources

Link for the [Annual Planning Website](#)

or



Annual Planning

Academic Affairs

- 2022-23 Annual Goals for the Academic Affairs area
 - Annual Planning Kick-off meeting for Academic programs
 - Nuventive Overview
 - Annual Planning Guide
 - Annual Planning Worksheets
-

Student Services

- 2022-23 Annual Goals for the Student Services area
 - Annual Planning Kick-off meeting for Student Services programs
 - Nuventive Overview
 - Annual Planning Guide
 - Annual Planning Worksheets
-

Administrative Areas

- 2022-23 College-wide Annual Goals

Annual Planning Resources

Annual Planning drop in **Office Hours**:

(every week until April 15th)

- Every Wednesday, 1:30 – 2:30pm
- Every Thursday, 3-4pm

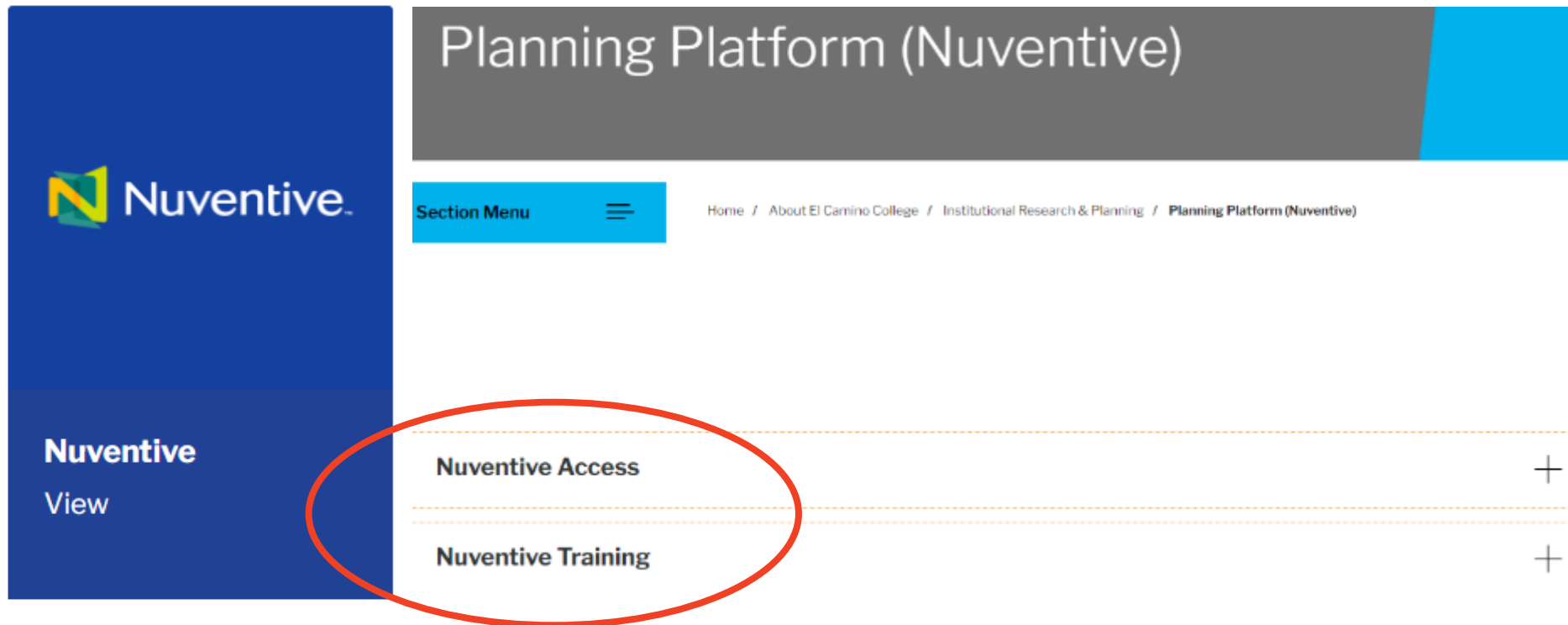
Zoom: <https://elcamino-edu.zoom.us/j/97952333604>

Zoom meeting ID: 979 523 3604

(same link for all meetings)

Nuventive Resources on IRP Website

- Nuventive log-in link can be found in [Nuventive Access](#)
- Today's PowerPoint presentation can be found in [Nuventive Training](#)



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?