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
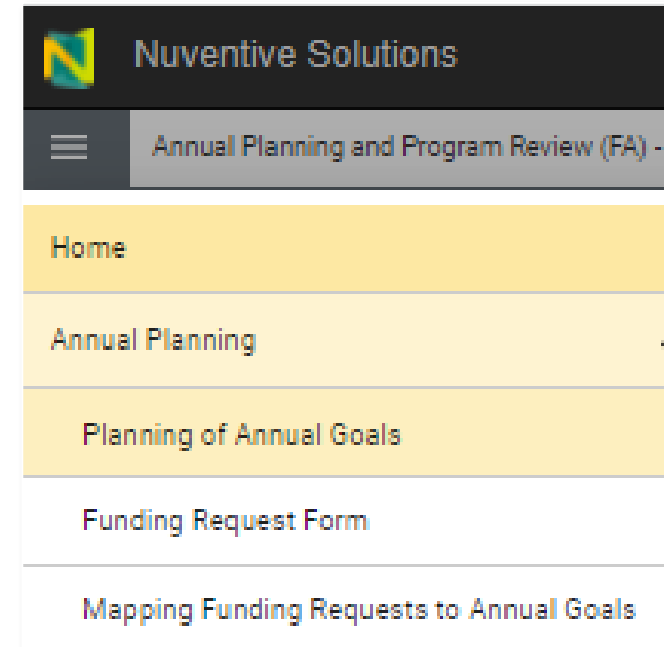
Worksheets

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

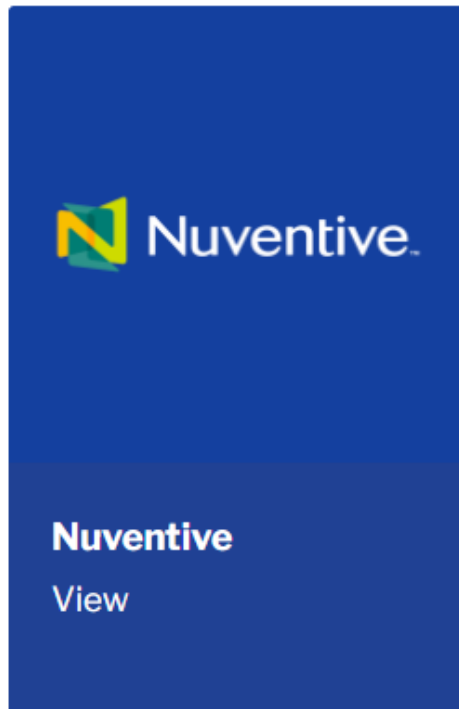# Logging in with URL

https://solutions.nuventive.com/

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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.
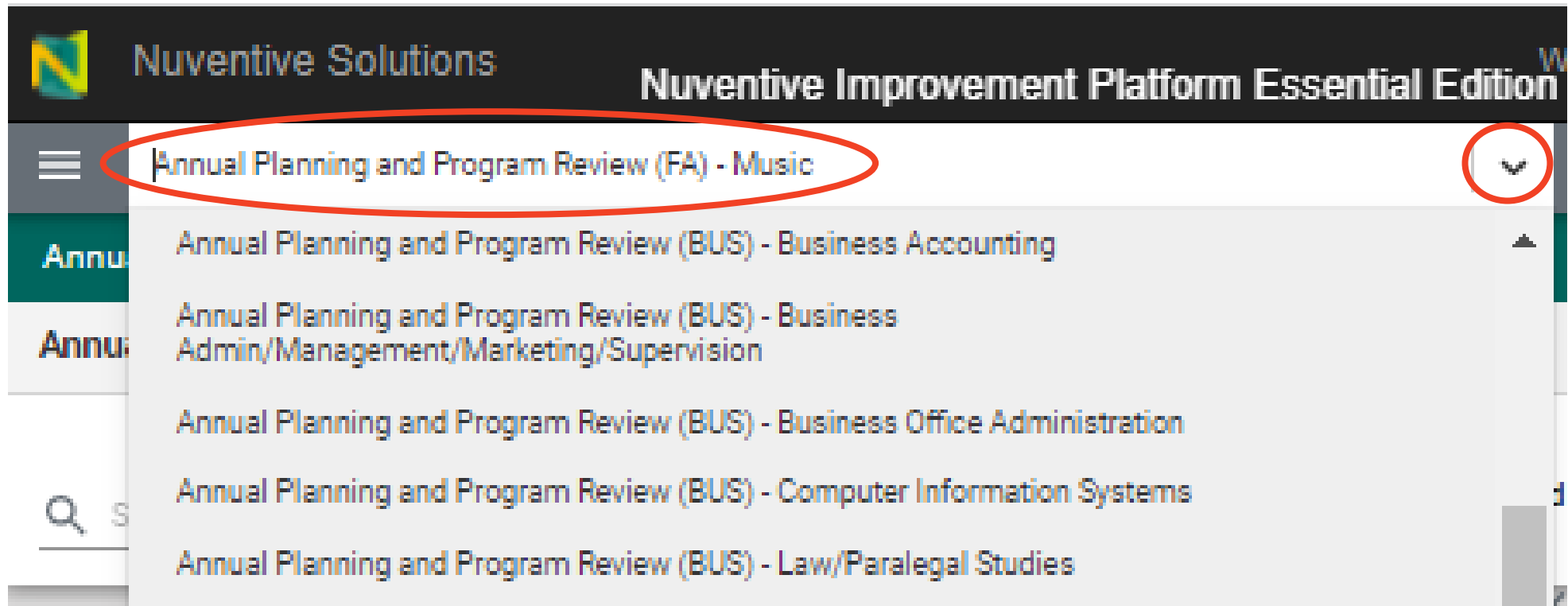
Logging in

Use your ECC credentials to log-in. Click on "Don't show this again" to stay logged into Nuventive in the future.
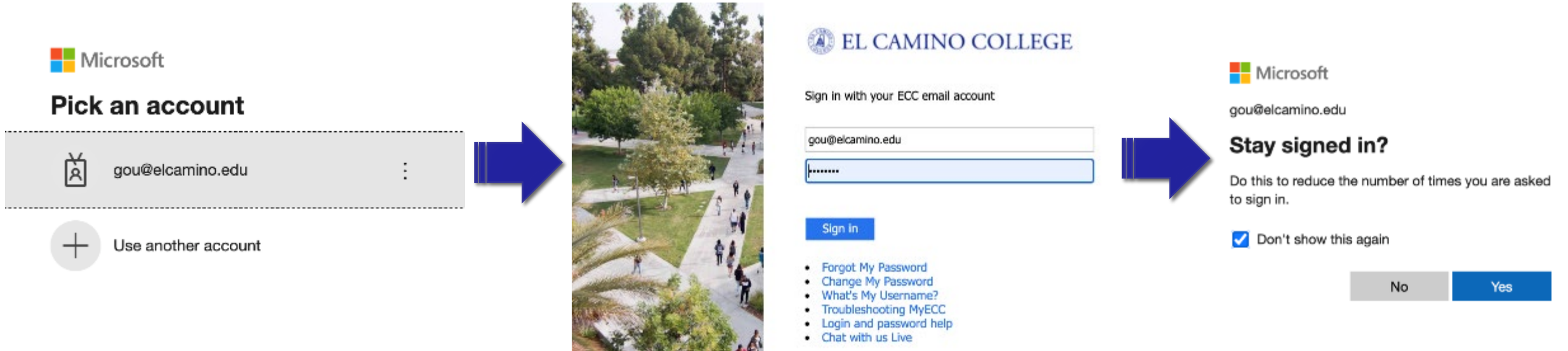
Select Your Office or Program Name

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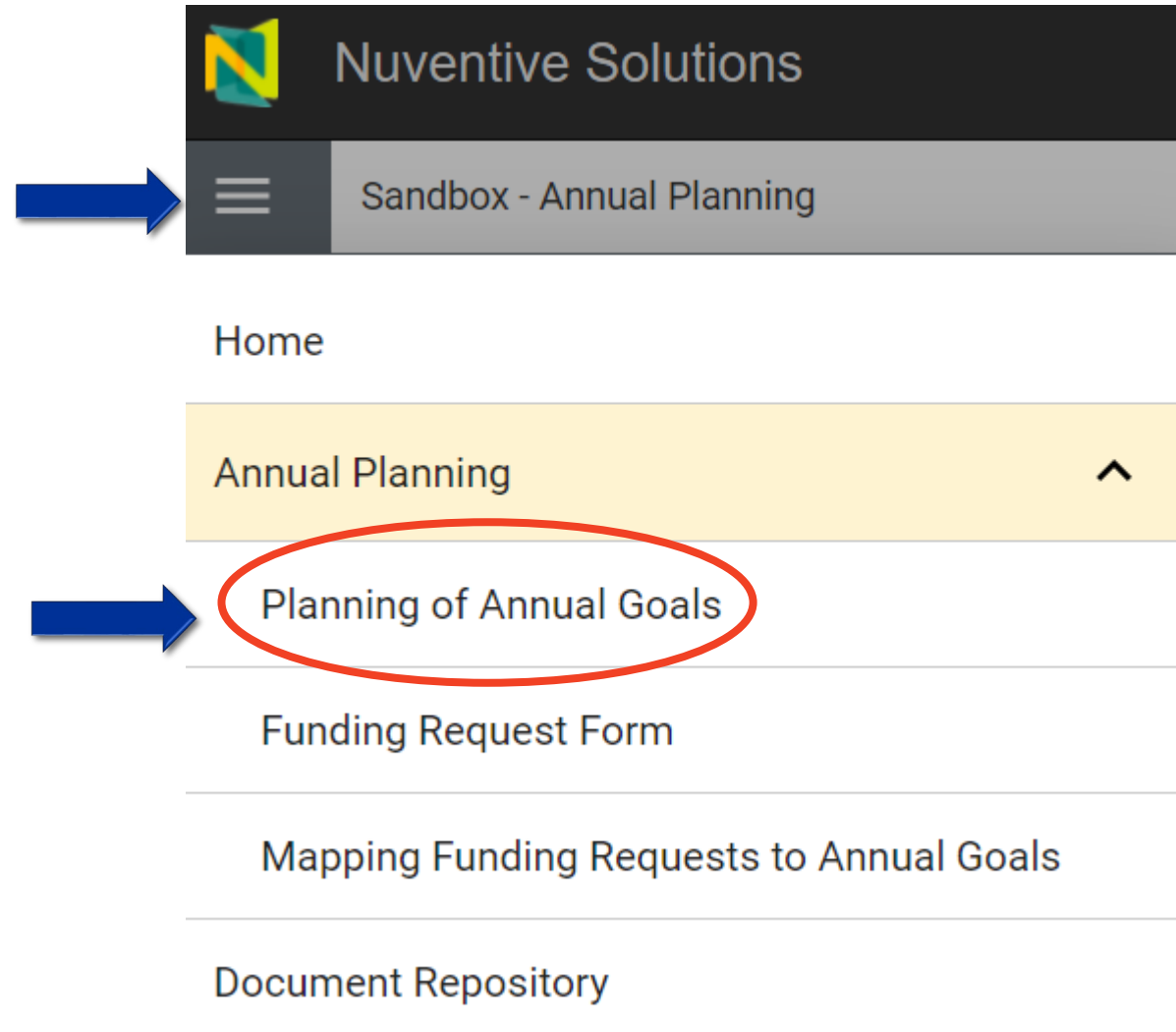
Entering Goals

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.

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Entering Goals

Entering Goals

Institutional Research and Planning

Annual Planning

New Annual Goal

A short distinct one-line summary to identify this goal. ✕
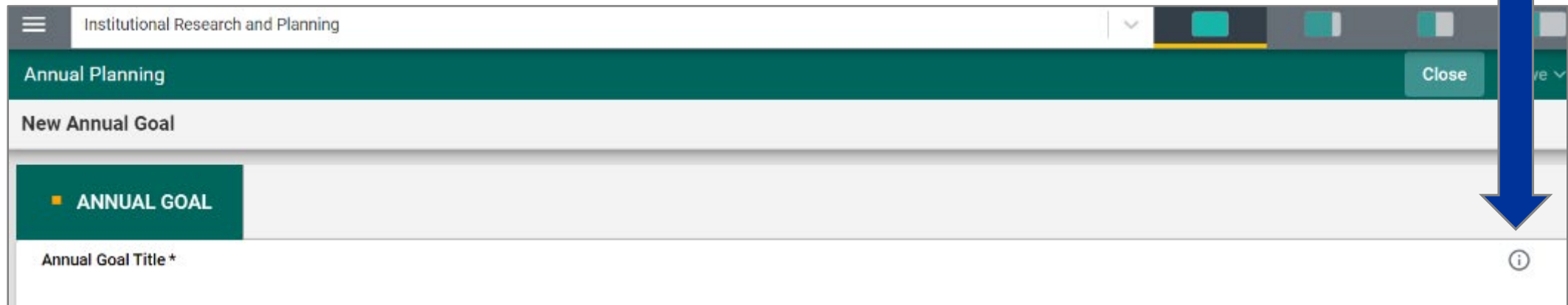
Annual Goal Title *

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   Close

New Annual Goal

■ **ANNUAL GOAL**

Annual Goal Title *   ⓘ

Entering Goals
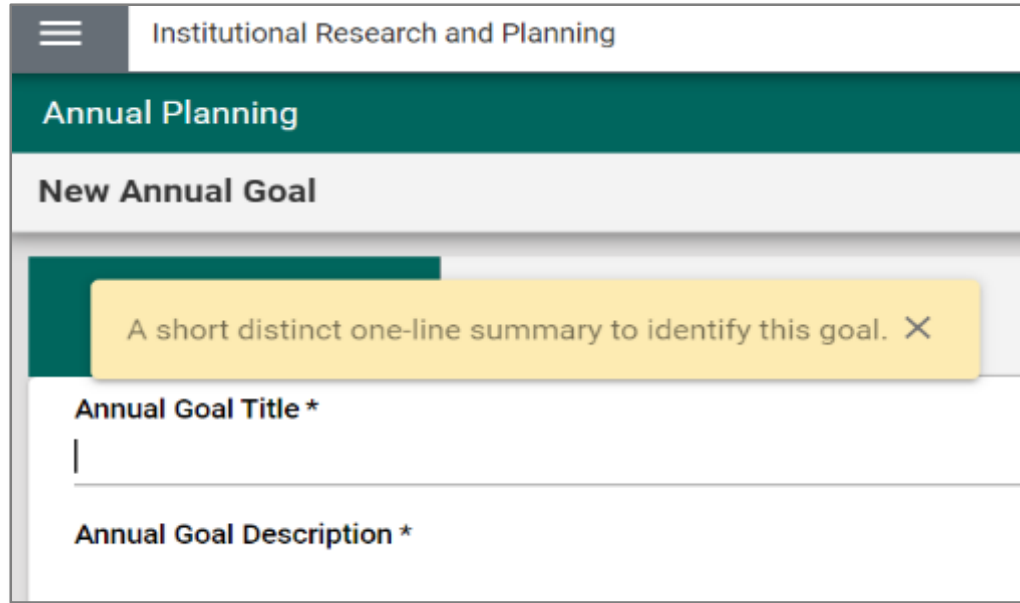
Annual Planning Worksheet (Word)

ANNUAL GOAL

Annual Goal Title *

Annual Goal Description *

Annual Goal Status *

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
A short distinct one-line summary to identify this goal.	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.	· Active – work on this goal is still in progress. · Not Started – goal will be implemented in the future, but work has not started yet.

Annual Planning Year = 2022-23

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

Data sources used to formulate the goal

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

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
How will we know when the goal has been achieved?	Description of the steps or projects needed to achieve a goal. One goal can have one or more than one action.

Resources
A general text description of the resources needed to execute the actions and to achieve the goal. This could be financial

Reviewing Goals

As goals are entered:
- One "card" per goal
- Filters used to view goal cards and hide old cards.

Annual Goal Status	Annual Planning Year(s)	Is a budget augmentation needed to support this goal?
View All	View All	View All

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
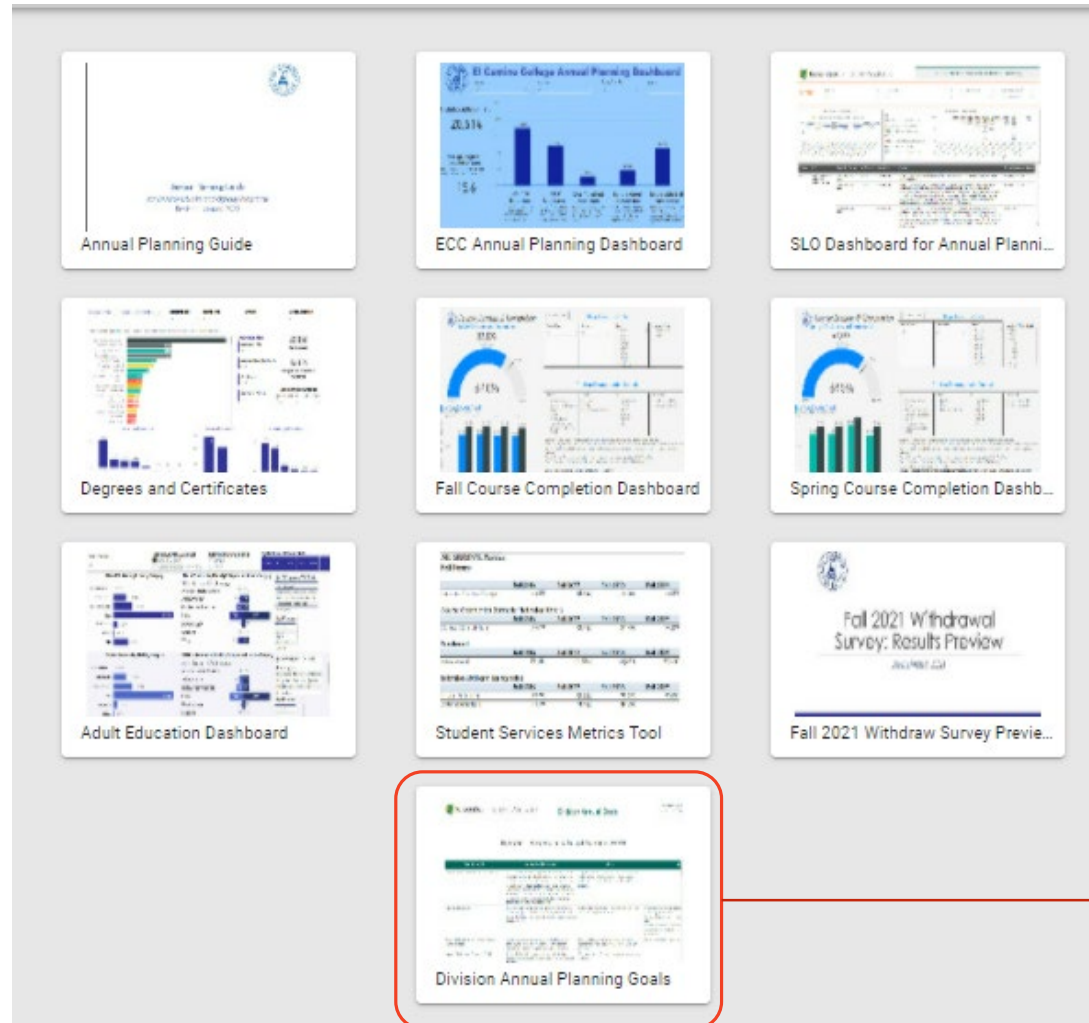
Divisional-level Goals:

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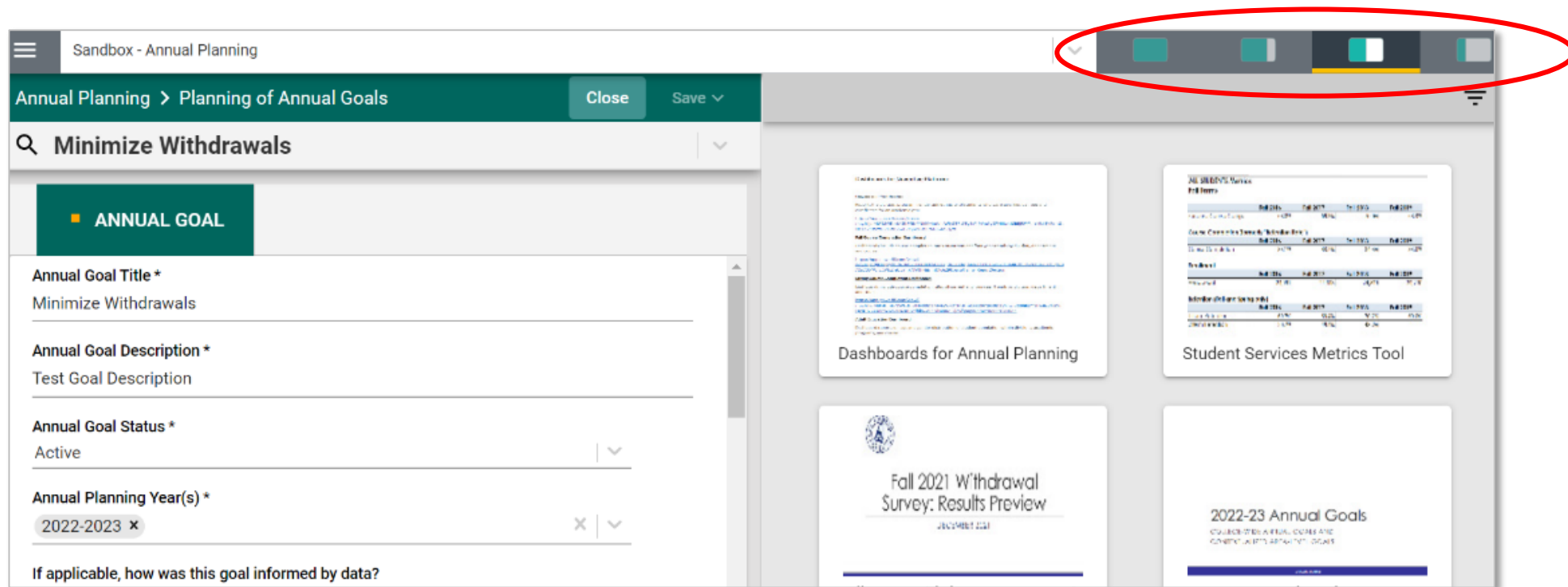
2021-22 Annual Plans entered into Nuventive last year will be on the right-hand bar of the Annual Goals form.

"Annual Planning Goals Report"

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.

Add screenshots of data to inform goal(s)

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

Saving Your Annual Plan

Saving Goals

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

Saving Goals

Funding Request Form

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

R

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."

T

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**.

Nuventive Solutions

Sandbox - Annual Planning

Home

Annual Planning ⌃

Planning of Annual Goals

Funding Request Form

Mapping Funding Requests to Annual Goals

Document Repository
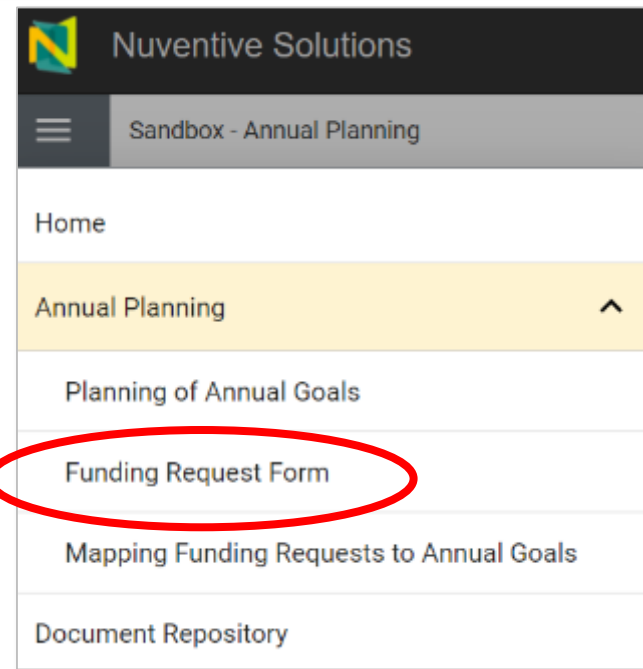
Funding Request Form

Click on the hamburger to get to the Home screen.
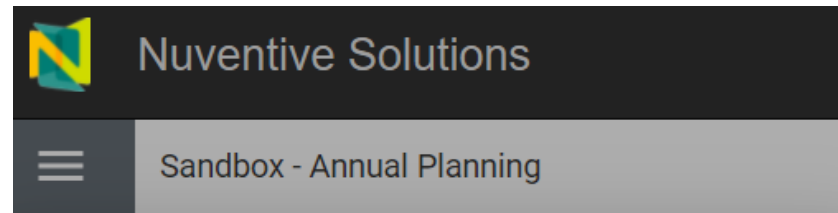
Click on **Funding Request Form**
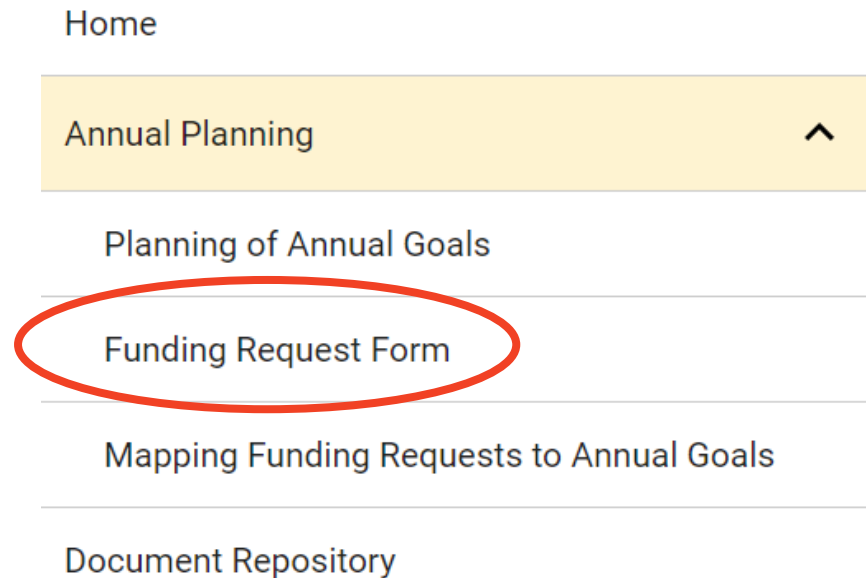
For Academic Affairs & Student Services: Historical records from TracDat

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

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

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

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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
For one-time or ongoing requests only: Amount requested for	For equipment replacement cycle: How much is the total cost to	For equipment replacement cycle: How many
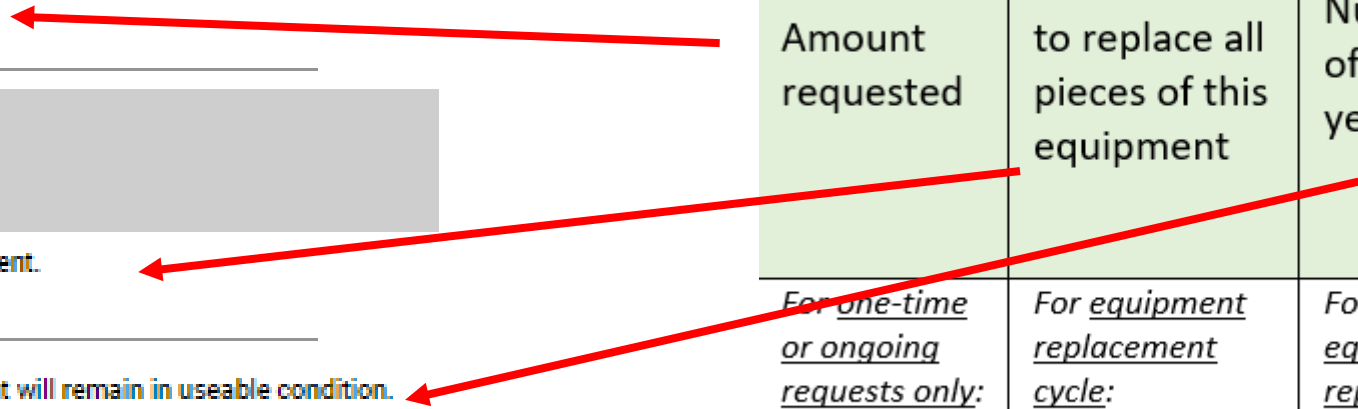
Leave the "For Manager Use Only" section blank. This will be used to communicate approval status at the end of the budgeting process.

Funding Request Form

Note to enter **_numbers only_** for the Amount Requested.

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

* 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

View All ⌄

Annual Planning Year

View All ⌄

Funding request approved

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

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?

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 <u>linked</u> 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													

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

9/15

Annual Planning Resources

Link for the Annual Planning Website

or

Annual Planning

Academic Affairs

- **2022-23 Annual Goals for the Academic Affiars 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)

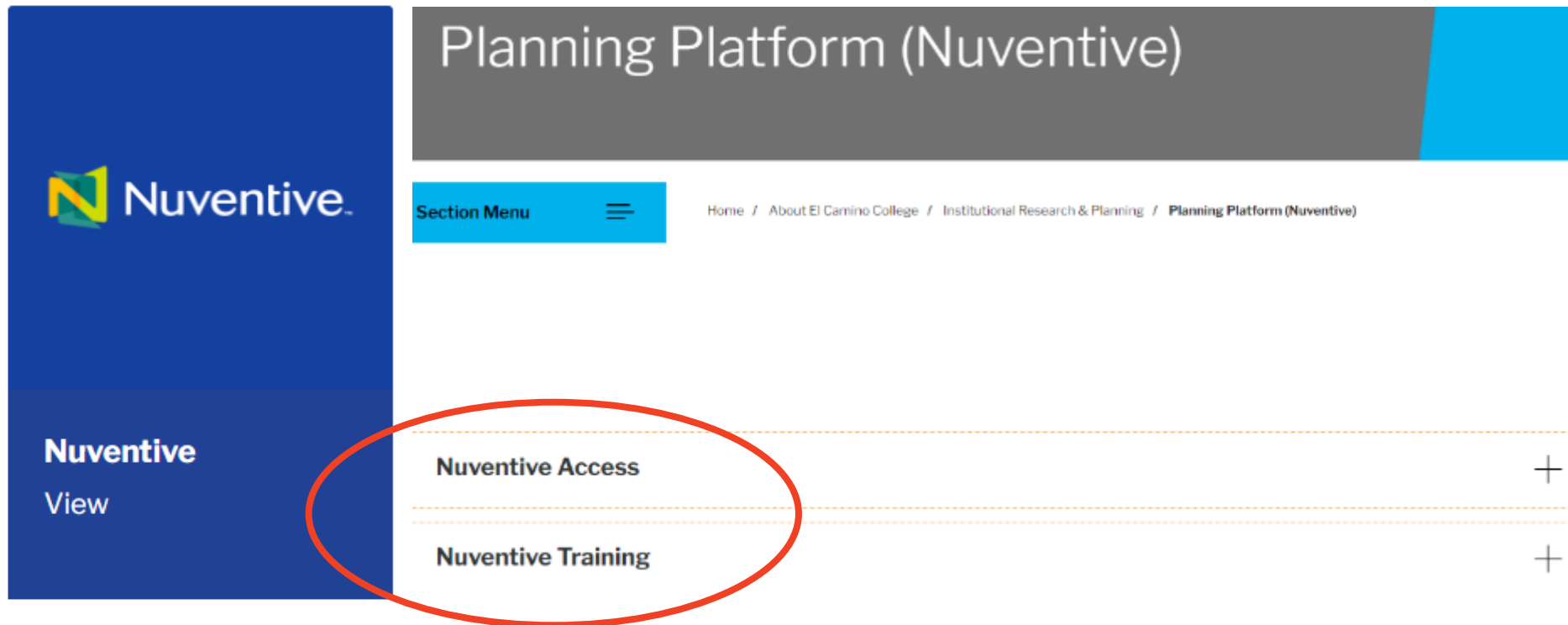- Every Wednesday, 1:30 – 2:30pm

- 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?