

# FY2022-23 Annual Planning NEW Nuventive Improve Training

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*JANUARY 14, 2022*

# Purpose of this meeting

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To provide an overview of:

- How to navigate the Nuventive Annual Planning module and
- Copy annual plans from the Word Annual Planning worksheet into Nuventive.

## *Annual Planning Worksheet – for Divisions/Units*

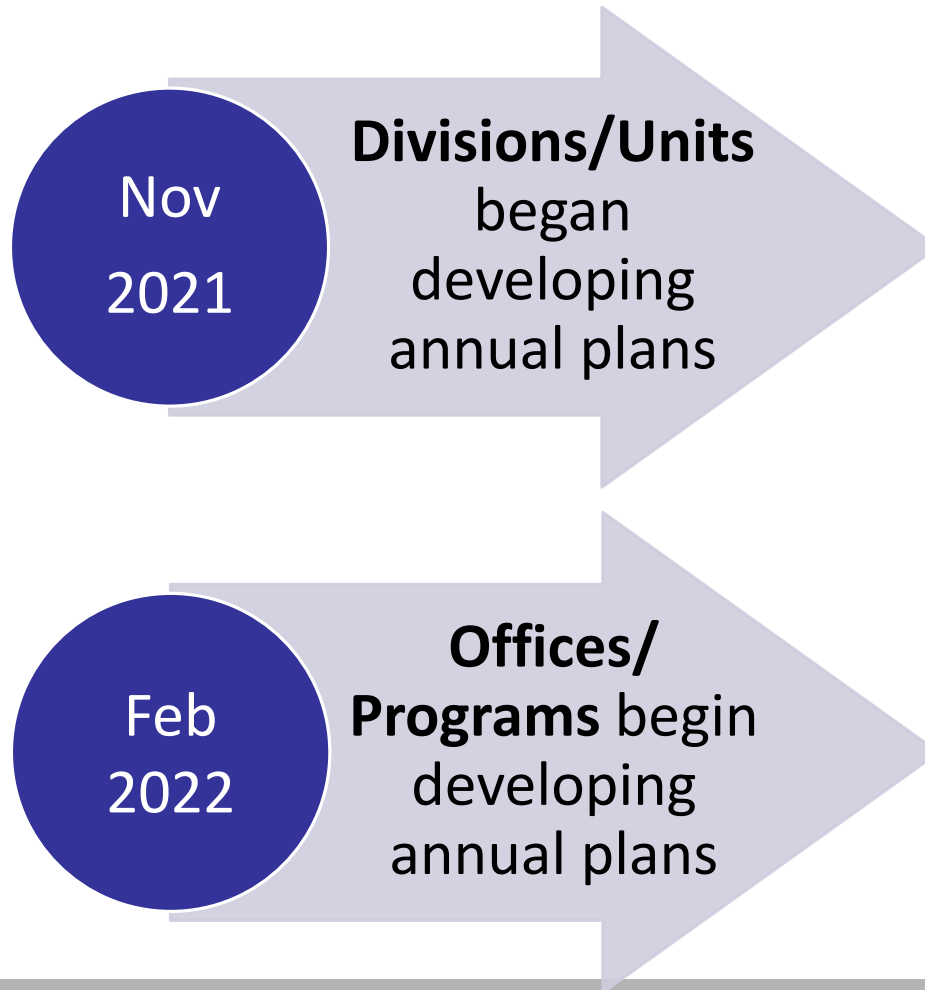
**Purpose of this worksheet:** To document annual plans so the annual plans are ready to input into ~~Nuventive~~. For internal use only within the division to help with brainstorming and internal discussions. These completed worksheets do not need to be submitted to IRP. *Please refer to the Annual Planning Guide for more detailed guidance for developing goals, metrics, actions, and resources.*

| Goal Title                                                      | Goal Description                                                                                                                                                                                                                        | Metric                                                                                                                                          | Actions<br>(optional for Divisions)                                                                                                                                                                                                                                          |
|-----------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <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> | <i>How will we know when the goal has been achieved? (either a quantitative indicator and target or a qualitative accomplishment statement)</i> | <i>Actions are tasks to complete in order to achieve an objective (e.g., update procedures, create templates, protocols, guides, fundraise, develop training, etc.). One goal can have one or more than one action, although no more than three actions are recommended.</i> |
|                                                                 |                                                                                                                                                                                                                                         |                                                                                                                                                 |                                                                                                                                                                                                                                                                              |

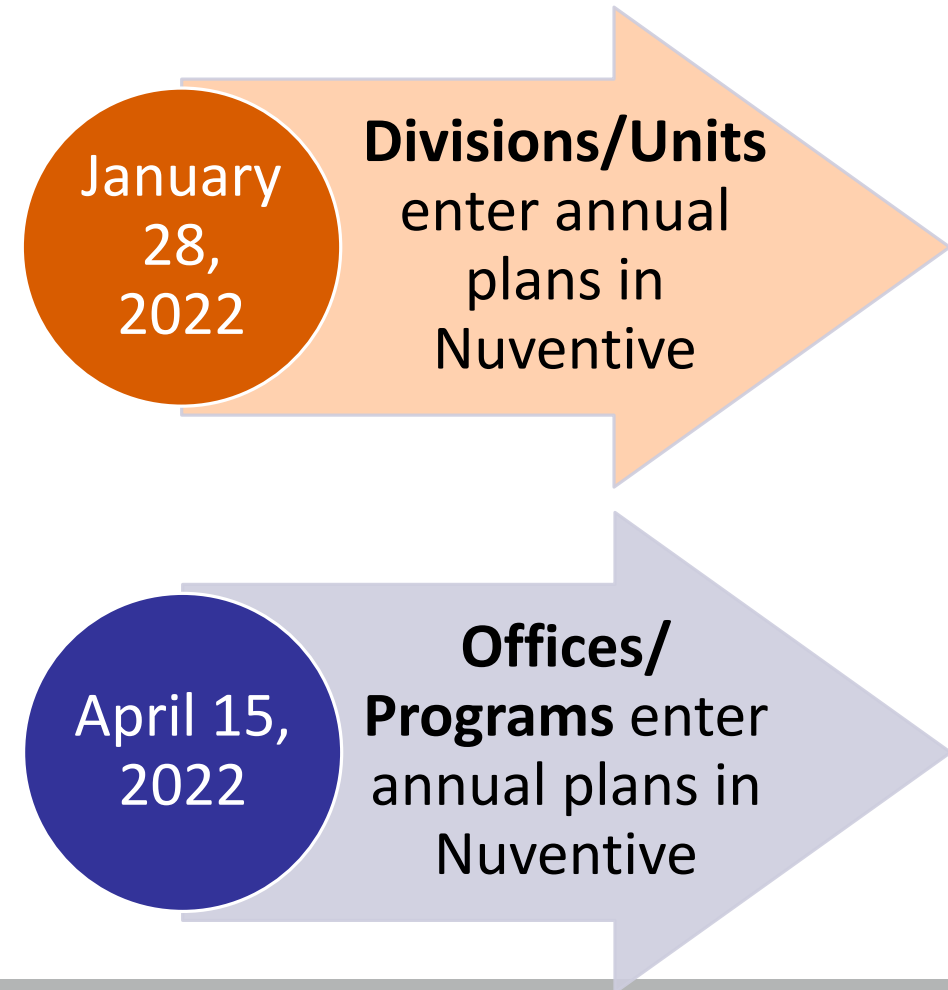
# Timeline and Process to Date

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## Annual Planning worksheet (MS Word)



## New Nuventive annual planning forms



# Nuventive Access & Log-in

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# Logging in with URL

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



# 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**  
View

### 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](#)
- [Link to old Nuventive/ Tracdat \(for plans prior to 2021\)](#)

# Logging in



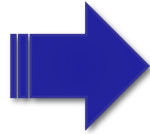
## Pick an account



gou@elcamino.edu



Use another account



EL CAMINO COLLEGE

Sign in with your ECC email account

gou@elcamino.edu

\*\*\*\*\*

Sign in

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



gou@elcamino.edu

## Stay signed in?

Do this to reduce the number of times you are asked to sign in.

☒ Don't show this again

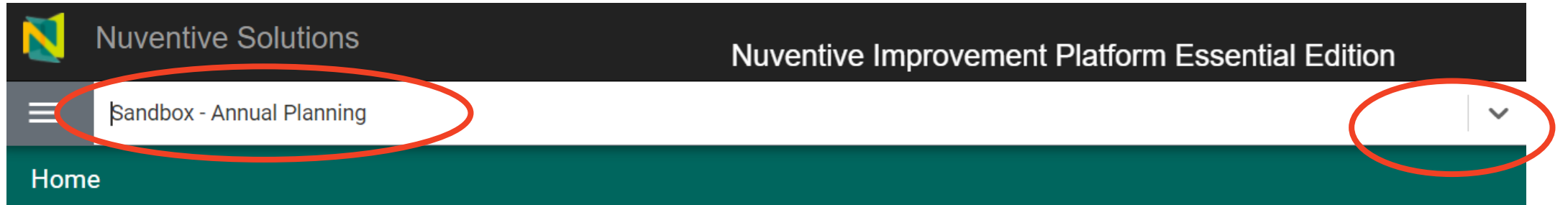
No

Yes

# Select Your Office Name

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

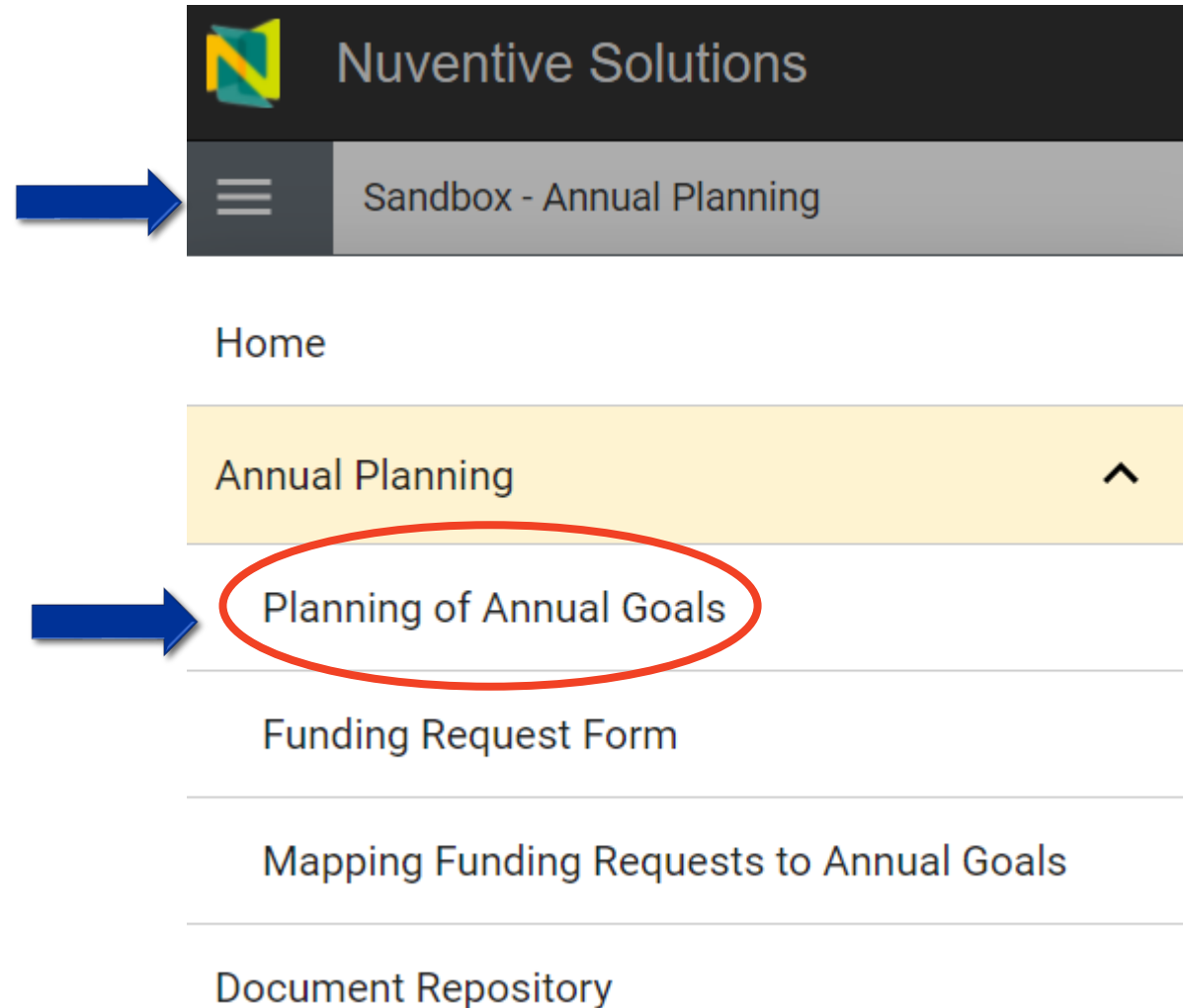


The screenshot displays the Nuventive Solutions interface. At the top, a dark header bar contains the Nuventive Solutions logo on the left and the text "Nuventive Improvement Platform Essential Edition" on the right. Below the header, a white navigation bar features a hamburger menu icon on the left, a search input field containing the text "Sandbox - Annual Planning", and a dropdown arrow icon on the right. A red oval highlights the search input field, and another red oval highlights the dropdown arrow icon. Below the navigation bar, a dark green bar displays the word "Home".



# Nuventive Menu

Click on the hamburger to get to the Home screen and then click on Planning of Annual Goals to start entering your goal(s).




# Entering Goals


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# Entering Goals

Click  to add a goal.

 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. 

Note: \* indicates a required field.

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

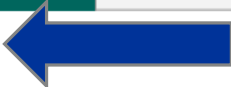
# Entering Goals

 Institutional Research and Planning


Annual Planning


New Annual Goal

■ ANNUAL GOAL

Annual Goal Title \*  \* Indicates a required field

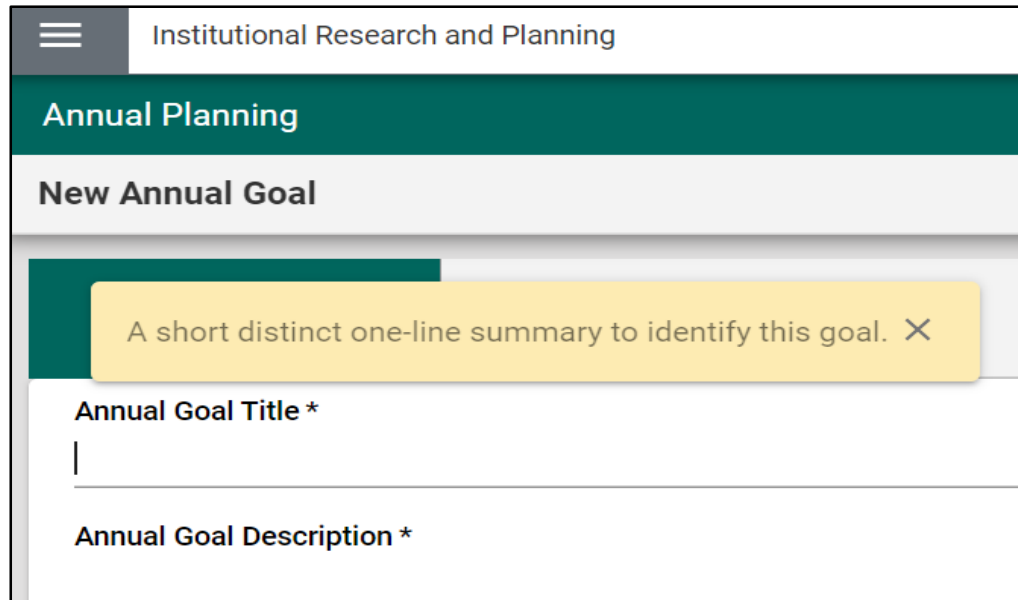
Annual Goal Description \*

Annual Goal Status \* 

Annual Planning Year(s) \* 


If applicable, how was this goal informed by data?

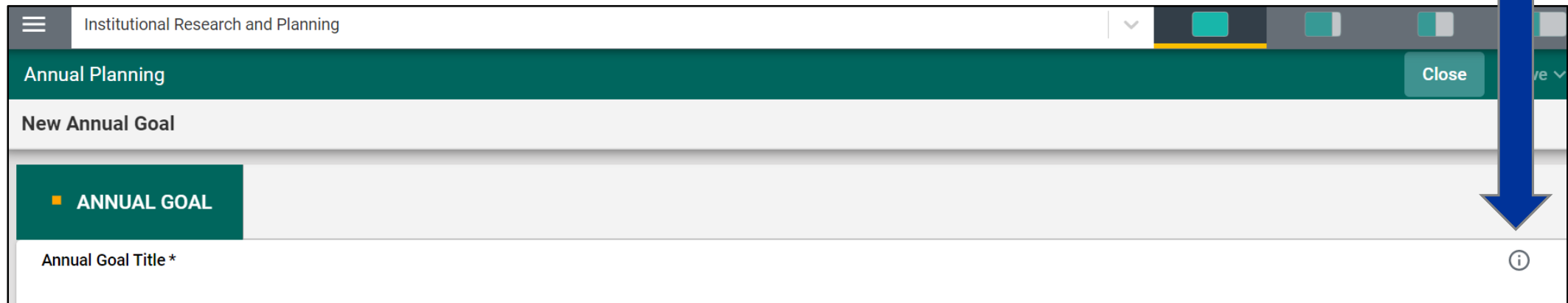
# Entering Goals



The screenshot shows the 'Institutional Research and Planning' header and 'Annual Planning' sub-header. Below is the 'New Annual Goal' section. A yellow tooltip box is displayed over the 'Annual Goal Description' field, containing the text: 'A short distinct one-line summary to identify this goal. X'. Below the tooltip, the 'Annual Goal Title' field is visible with a cursor, and the 'Annual Goal Description' field is partially visible below it.

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

Click "x" to close the description box. To access the description again, click on the .



The screenshot shows the same 'New Annual Goal' form, but the yellow tooltip is closed. A blue arrow points down from the text above to an information icon (i) located at the bottom right of the 'Annual Goal Title' field. The 'Annual Goal Description' field is now fully visible below the title field. A 'Close' button is visible in the top right corner of the form area.

# Entering Goals

☰ Institutional Research and Planning

Annual Planning

New Annual Goal

■ ANNUAL GOAL

Annual Goal Title \*

Annual Goal Description \*

Annual Goal Status \* ▼

Annual Planning Year(s) \* ▼

If applicable, how was this goal informed by data?

## Annual Plan – Word worksheet

| Goal Title                                                      | Goal Description                                                                                                                                                                                                                        |
|-----------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <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> |
|                                                                 |                                                                                                                                                                                                                                         |

When entering a new goal, select **ACTIVE** as the “Annual Goal Status”.

Annual Planning Year = 2022-23

*Optional for divisions:* Helps provide context to the goal.

# Entering Goals

## Annual Plan – Word worksheet

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<br>(optional for Divisions)                                                                                                                                                                              |
|------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| How will we know when the goal has been achieved? (either a quantitative indicator and target or a qualitative accomplishment statement) | Actions are tasks to complete in order to achieve an objective (e.g., update procedures, create templates, protocols, guides, fundraise, develop training, etc.). One goal can have one or more than one action. |
|                                                                                                                                          | Resources<br>(optional for Divisions)                                                                                                                                                                            |
|                                                                                                                                          | Describe the resources needed to complete the actions and achieve the goals of the division/unit.<br>(e.g., staff with specialized skills, access to software or equipment)                                      |

# Reviewing Goals

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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



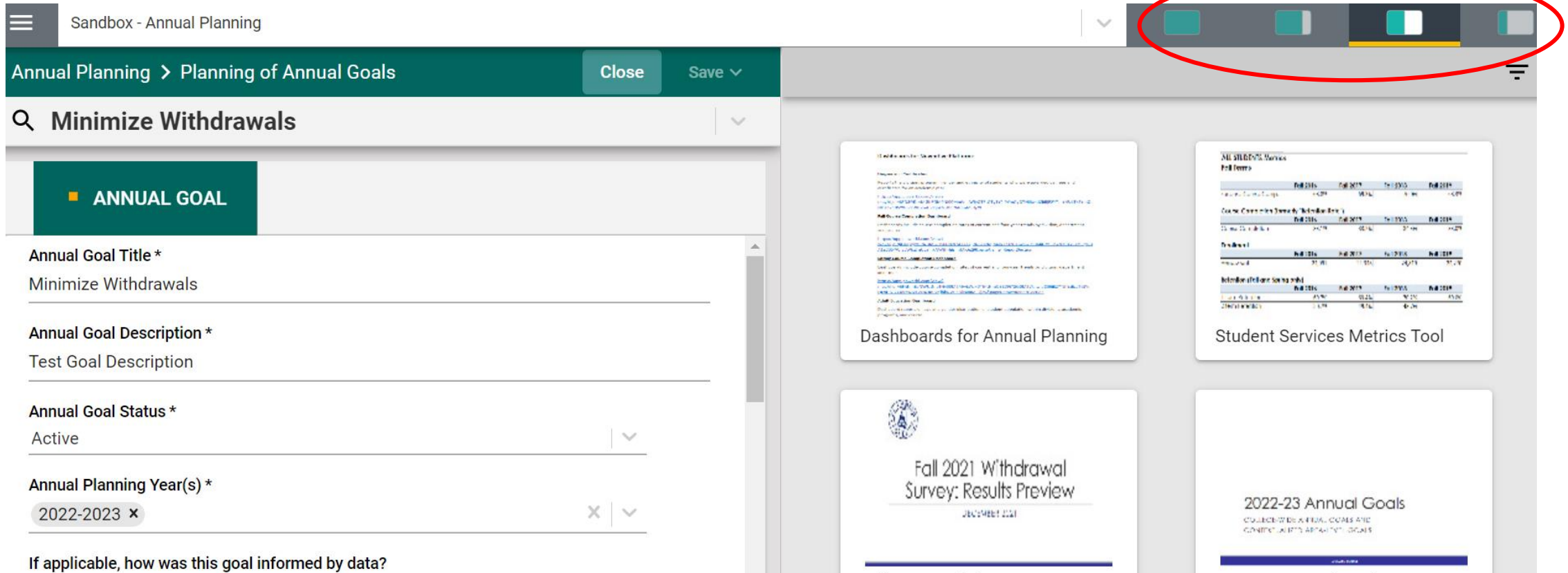


# Adding & Attaching Documents (Document Repository)

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# Data and Documents on the Side Bar

Some data/documents are available on the side bar for you to use to support your annual planning goals. Click on viewing options to enlarge data/documents on the right side bar.



Sandbox - Annual Planning

Annual Planning > Planning of Annual Goals

Close Save

Minimize Withdrawals

ANNUAL GOAL

Annual Goal Title \*

Minimize 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?

Dashboards for Annual Planning

Student Services Metrics Tool

Fall 2021 Withdrawal Survey: Results Preview

2022-23 Annual Goals

# Data and Document

Download or print documents by clicking on the appropriate icons.

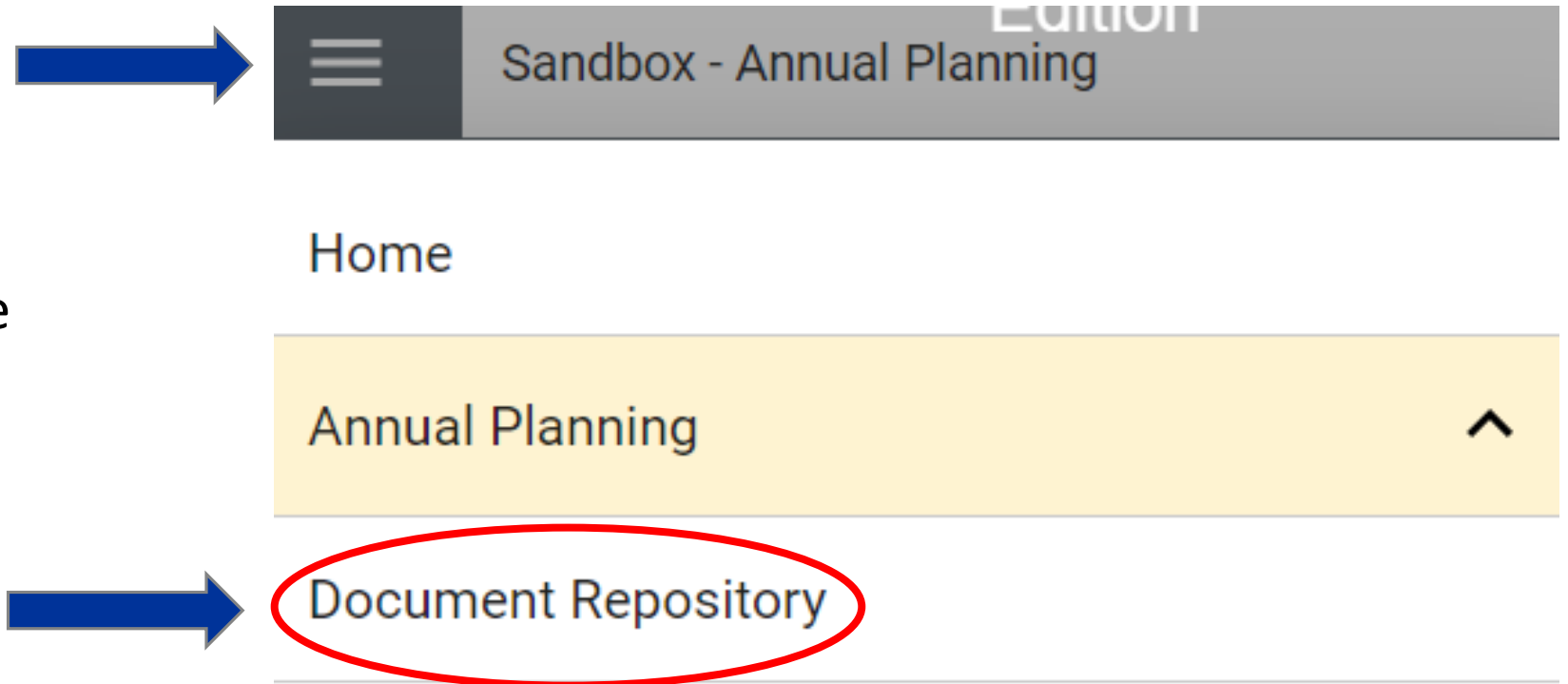
The screenshot displays the 'Sandbox - Annual Planning' interface. The main content area shows a document titled 'Fall 2021 Withdrawal Survey: Results Preview' with the El Camino College logo and the date 'DECEMBER 2021'. A red circle highlights the download and print icons in the top right corner of the document preview. The sidebar on the left contains the following information:

- Annual Planning > Planning of Annual Goals** (with 'Close' and 'Save' buttons)
- Minimize Withdrawals** (with a search icon and a dropdown arrow)
- ANNUAL GOAL** (with a green square icon)
- Annual Goal Title \***: Minimize Withdrawals
- Annual Goal Description \***: Test Goal Description
- Annual Goal Status \***: Active (with a dropdown arrow)
- Annual Planning Year(s) \***: 2022-2023 (with a dropdown arrow and a close button)

# Document Repository

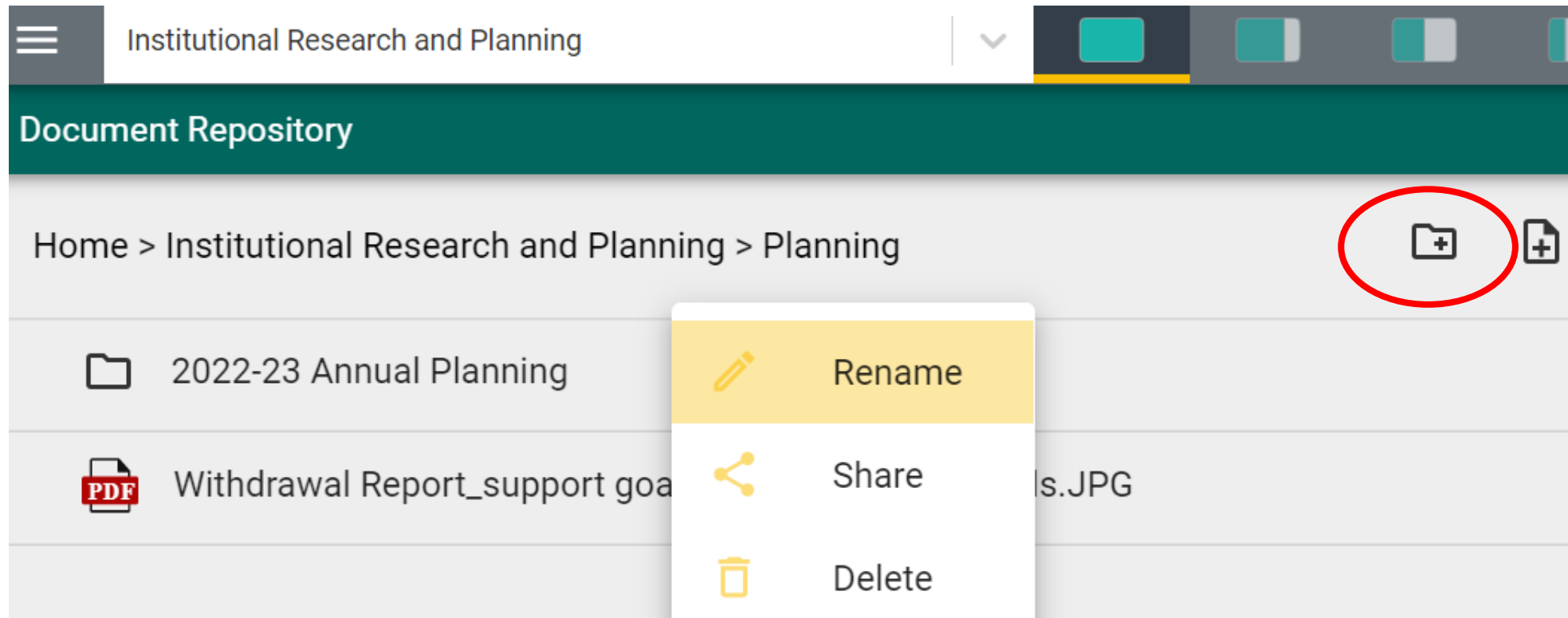
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Access the Document Repository by clicking on the hamburger. All the documents you upload/add are stored in the Document Repository.



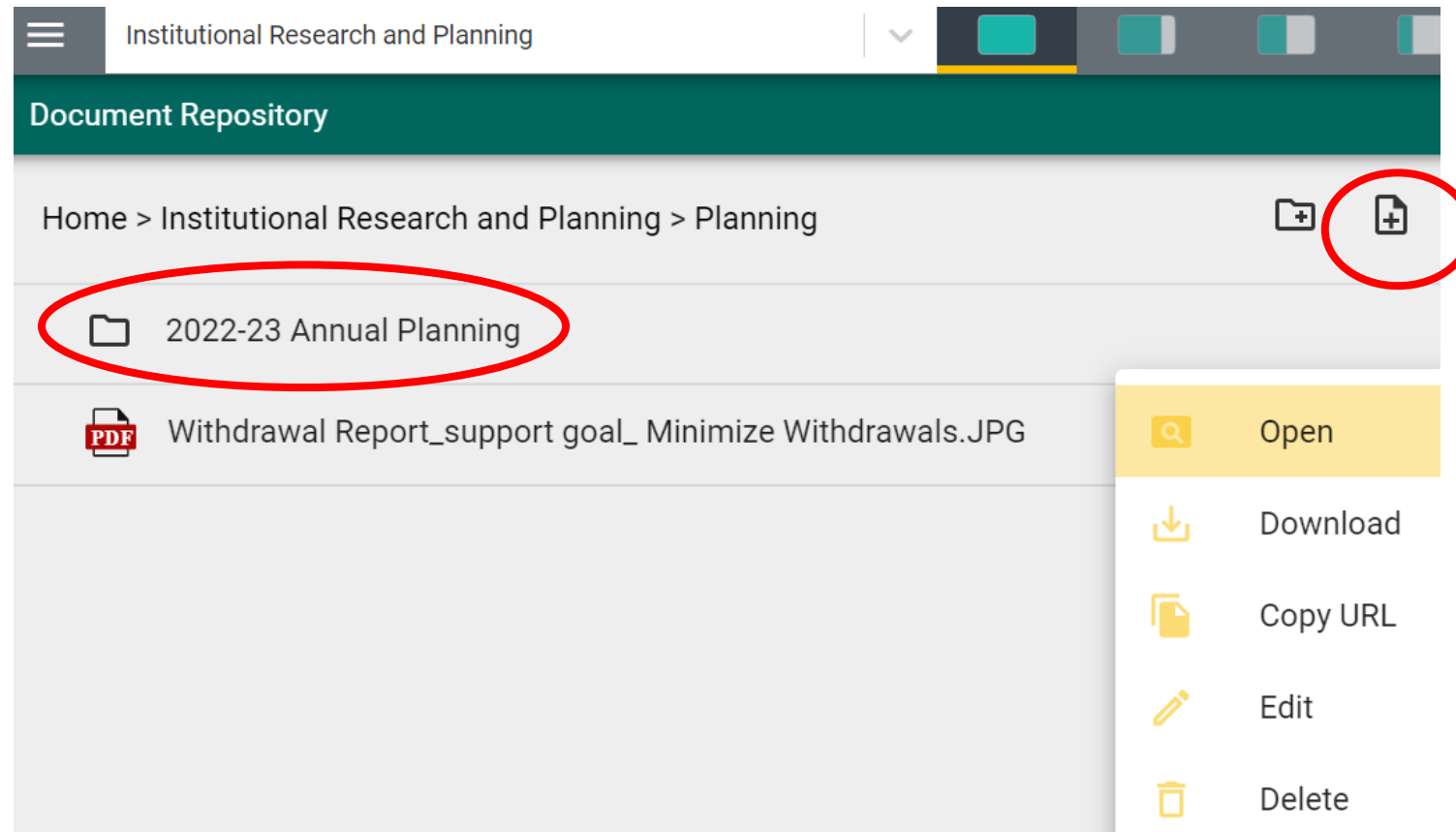
# Document Repository: Creating Folders

***As there is no drag and drop feature here, we highly recommend to create folders before adding in documents*** so you can add files to relevant folders before you attach the documents to the Planning of Annual Goals page(s)/card(s). Folders can be renamed, shared, and deleted.



# Document Repository: Adding Documents

Select the folder you would like to add the document(s), then click  to add.



# Document Repository: Adding Documents

---

Complete the information in this pop-up window. Add a document by choosing files from your computer or by inserting the Url. Click Save when done.

## Add Document(s) to 2022-23 Annual Planning

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Choose Files No file chosen

Urls

Name \*

Url \*

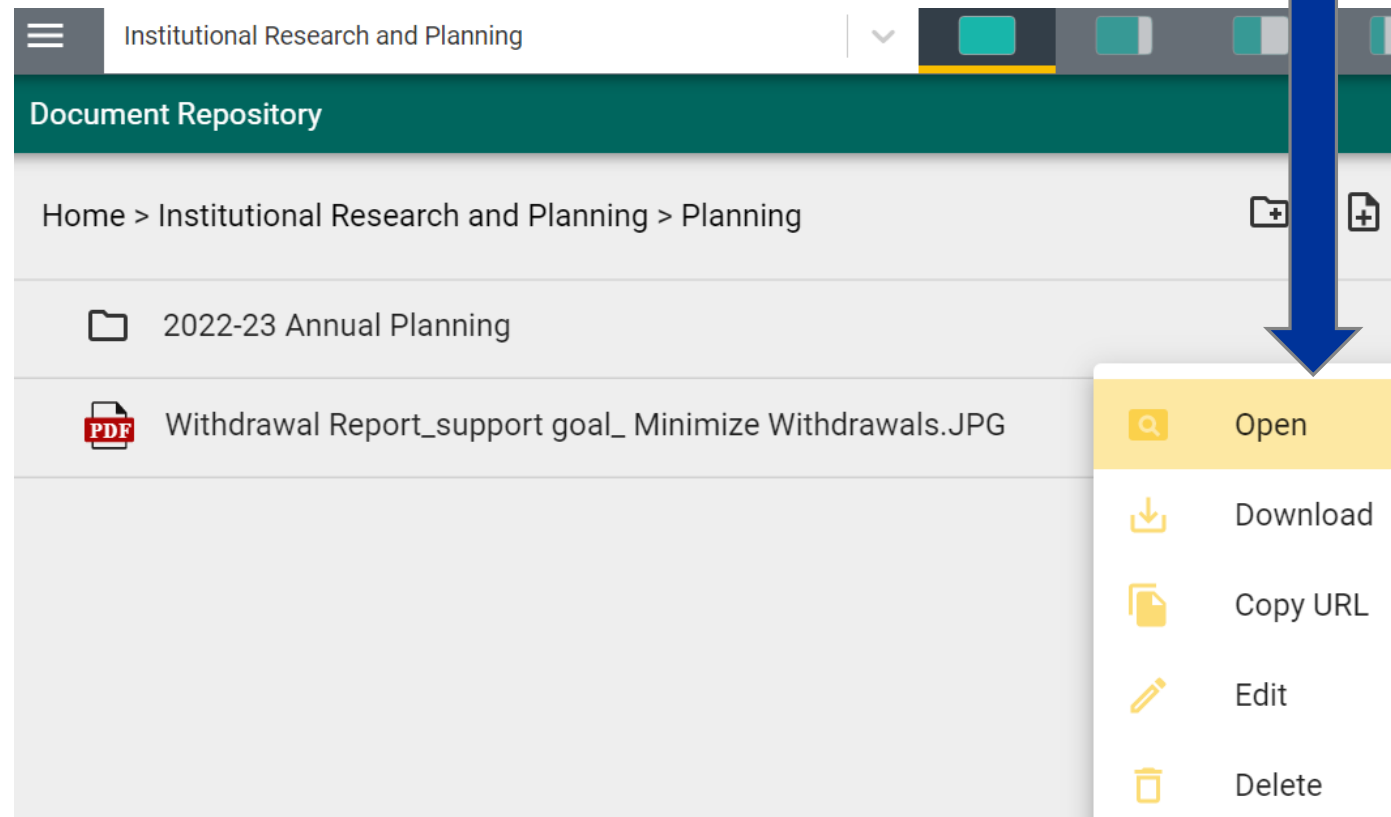
Description

CANCEL X

SAVE 

# Document Repository: Adding Documents

Click on the three dots to the right of a document to see a list of features.





# Adding Documents in Planning of Annual Goals

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Click on  to attach a document.

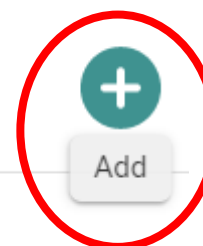
■ ANNUAL GOAL

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

Document Name



Document Description

There are no documents attached






# Adding Documents in Planning of Annual Goals

Document Relate Reposit...

ATTACH  

Home > SANDBOX - ANNUAL PLANNING > GENERAL

 Withdrawal Survey Report

  Undertanding and Minimizing Withdrawals.JPG

Add document




Create a folder

The documents will show here after they have been added.


# Attaching Documents in Planning of Annual Goals

After the document has been added, select the document by clicking on it (when selected, the document appears yellow with a check mark) and then click “ATTACH”.


Document Relate Repository



ATTACH   

---

 > SANDBOX - ANNUAL PLANNING > GENERAL

---

 Withdrawal Survey Report

  Undertanding and Minimizing Withdrawals.JPG



# Attaching Documents in Planning of Annual Goals

The document that has been attached will appear in this section of the Planning of Annual Goals page.

To delete an attached document, click on the X.

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

| Document Name                                | Document Description               |
|----------------------------------------------|------------------------------------|
| Understanding and Minimizing Withdrawals.JPG | Fall 2021 Withdrawal Survey Report |

  
Add  


# Budget Augmentation

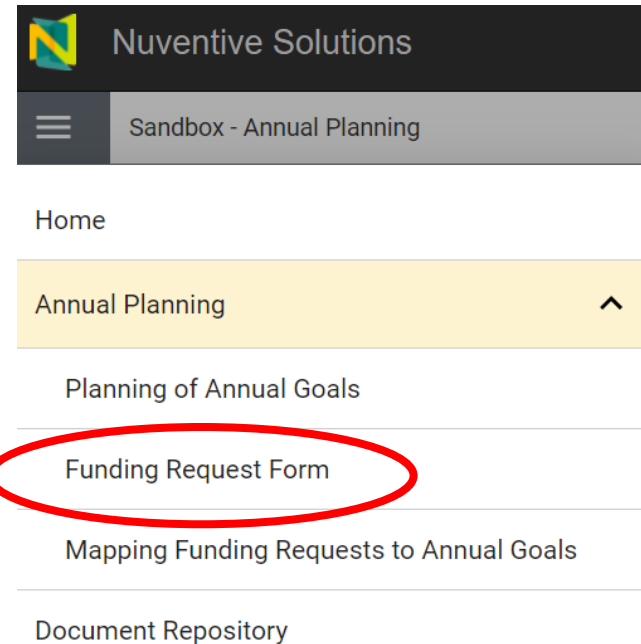
R If a budget augmentation (i.e., an increase to the current total annual budget) is needed to support this  
T goal, please complete a "Funding Request" form."

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.



# Saving Your Annual Plan

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# 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 \*

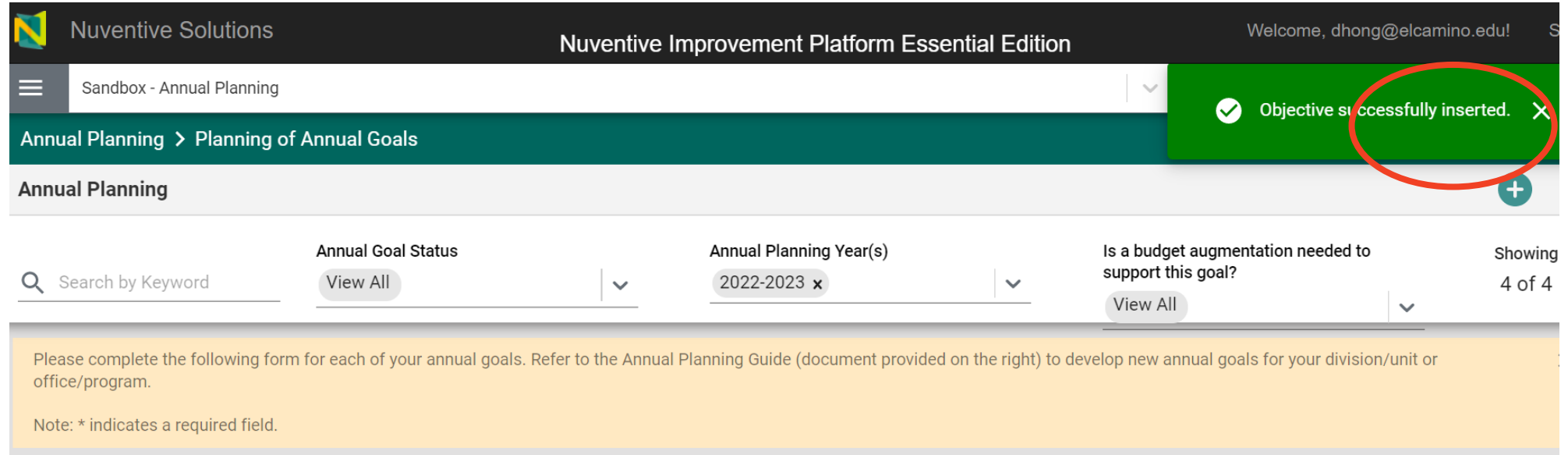
Active ▾ ⓘ

Annual Planning Year(s) \*

2022-2023 x ▾

The Save function only works when all required fields (indicated with \*) have been completed. So be sure to complete all your fields, especially the required ones before saving.

# Saving Goals



This screenshot shows the Nuventive Solutions interface for 'Sandbox - Annual Planning'. The top navigation bar includes the Nuventive Solutions logo, the title 'Nuventive Improvement Platform Essential Edition', and a user welcome message 'Welcome, dhong@elcamino.edu!'. The left sidebar shows the current path: 'Annual Planning > Planning of Annual Goals'. A green notification banner at the top right states 'Objective successfully inserted.' with a checkmark icon and a close button (X). Below the notification, there are filters for 'Annual Goal Status' (set to 'View All'), 'Annual Planning Year(s)' (set to '2022-2023'), and 'Is a budget augmentation needed to support this goal?' (set to 'View All'). A search bar is also present. A yellow informational box contains text about completing forms for annual goals and a note that an asterisk indicates a required field. The bottom right corner shows 'Showing 4 of 4' items.

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

Sandbox - Annual Planning

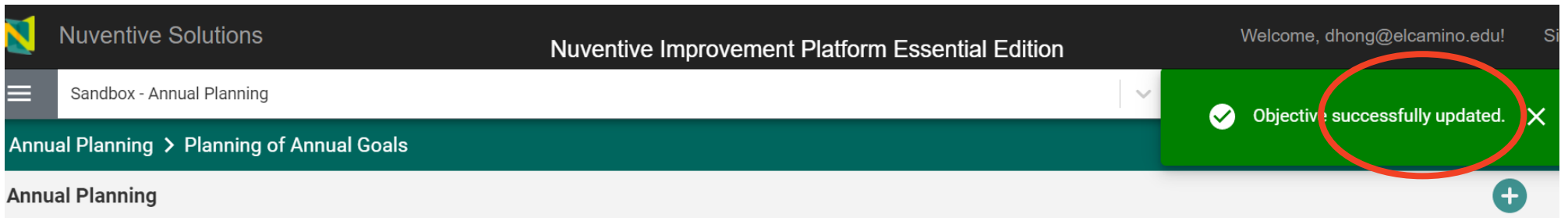
Annual Planning > Planning of Annual Goals

Annual Planning

Search by Keyword Annual Goal Status View All Annual Planning Year(s) 2022-2023 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.



This screenshot is similar to the first one, showing the same Nuventive Solutions interface. The green notification banner at the top right now states 'Objective successfully updated.' with a checkmark icon and a close button (X). The rest of the interface, including the navigation, filters, and informational text, remains the same.

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 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.

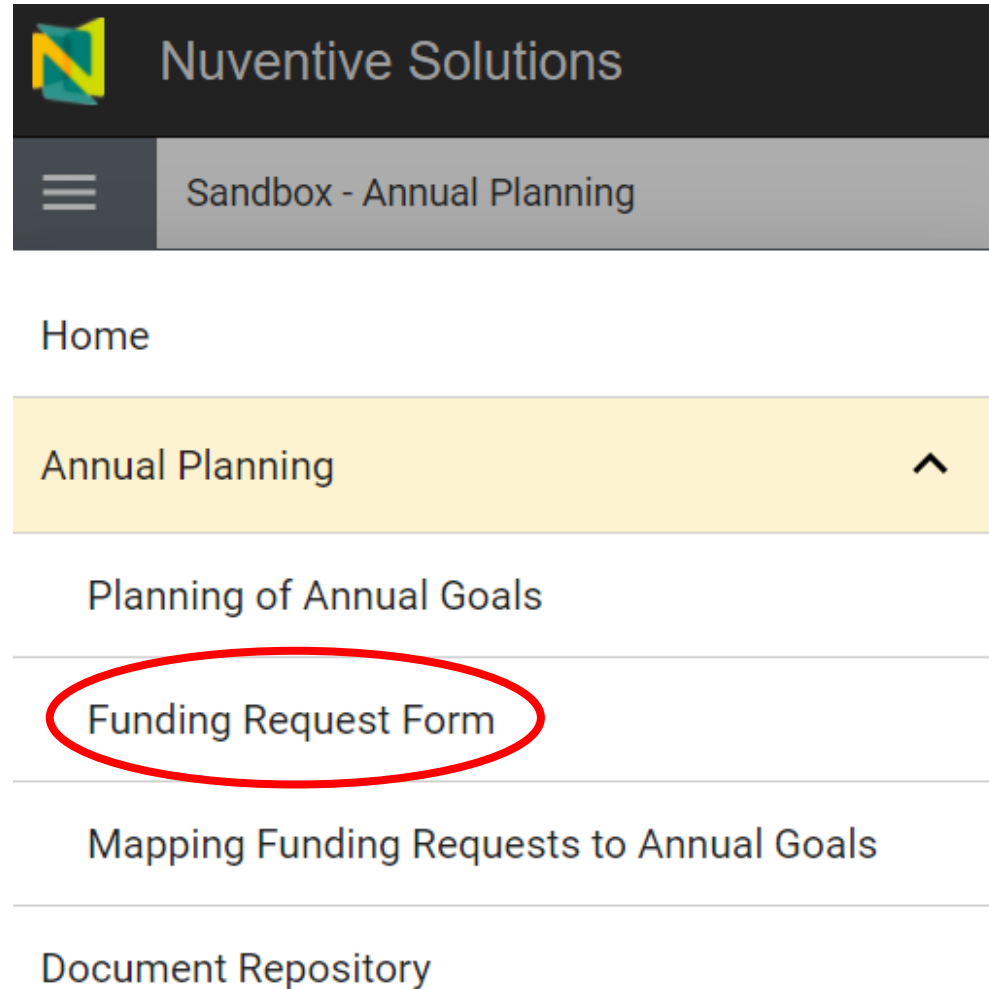


# Funding Request Form

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# Funding Request Form

To Access  
Funding  
Request Form,  
click on the  
hamburger and  
select Funding  
Request Form.



# Do you need to complete a Funding Request Form?

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You will only need to complete a Funding Request form if you select “yes” to the budget augmentation question in the Planning of Annual Goals.

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

Is a budget augmentation needed to support this goal? \*

Yes



# Funding Request Form

FUNDING REQUEST

MAPPING

Funding Request Name \*

Full-time outreach staff member

Annual Planning Year \*

2022-23

Amount Requested \*

55,000

Funding Category \*

Staffing

| Resources<br>(optional for Divisions)                                                                                                                           | Goal Title                                           | Action                                       | Rationale                                                | Funding category                                                                                                                                               | Estimated cost<br>per category                                           |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------|----------------------------------------------|----------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------|
| Describe the resources needed to complete the actions and achieve the goals of the division/unit<br>(e.g., staff with specialized skills, access to software or | Goal of the division that this resource will support | Action that this resource will help complete | How will the resource support the goals of the division? | Which category most closely describes this resource request?<br>a) staffing,<br>b) technology/software,<br>c) instructional equipment,<br>d) non-instructional | List \$ dollar amount needed above and beyond current budget allocations |

Note: 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

Is this a one-time or ongoing need for funding?

A request for one-time funding supports an initiative that has a beginning and an end.

Does this funding request directly address a critical risk?

Critical risks include:

- a known condition likely to result in harm, injury, illness, exposure, loss of life or destruction of property (health/safety risk)
- the likelihood of a lawsuit, fine, citation or reputational damage against the District (liability risk)

If applicable, was this funding request mentioned or derived from the last program review?

Applicable for Programs only. For divisions, select N/A – Program Review not required.

Rationale for funding request

| Resources<br>(optional for Divisions)                                                                                                                                    | Goal title                                                  | Action                                               | Rationale                                                       | Funding category                                                                                                                                                          | Estimated cost<br>per category                                                  |         |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------|------------------------------------------------------|-----------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------|---------|
| <i>Describe the resources needed to complete the actions and achieve the goals of the division/unit.<br/>(e.g., staff with specialized skills, access to software or</i> | <i>Goal of the division that this resource will support</i> | <i>Action that this resource will help complete.</i> | <i>How will the resource support the goals of the division?</i> | <i>Which category most closely describes this resource request?<br/>a) staffing,<br/>b) technology/software,<br/>c) instructional equipment,<br/>d) non-instructional</i> | <i>List \$ dollar amount needed above and beyond current budget allocations</i> | <i></i> |

# 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.

# Funding Request Form: Amount Requested

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



| FUNDING REQUEST                | MAPPING |
|--------------------------------|---------|
| Funding Request Name *         |         |
| Test Goal 1 Funding: New Staff |         |
| Amount Requested *             |         |
| 65,000                         |         |

Please enter numbers only - no text. ✕

# Funding Request Form

Complete the funding request form. Keep the “For Manager Use Only” section blank.

Sandbox - Annual Planning

Annual Planning > Funding Request Form

New Funding Request

**FUNDING REQUEST** MAPPING

Rationale for funding request

**For Manager Use Only**

Funding request approved

Funding request review – comments



# Reviewing Funding Requests

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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



# Mapping

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# Mapping

Annual Planning > Funding Request Form

🔍 Outreach staff member

■ FUNDING REQUEST MAPPING

Funding Request Name \*

Full-time outreach staff member

---

Annual Planning Year \*

2022-23

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

# Mapping Funding Request to Goal

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.

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

# Mapping Funding Request to Goal

The Word worksheet should help with mapping funding request to an annual goal.

Funding Request

Goal

| Resources<br>(optional for Divisions)                                                                                                                                    | Goal Title                                                  | Action                                               | Rationale                                                       | Funding ca                                                                                             |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------|------------------------------------------------------|-----------------------------------------------------------------|--------------------------------------------------------------------------------------------------------|
| <i>Describe the resources needed to complete the actions and achieve the goals of the division/unit.<br/>(e.g., staff with specialized skills, access to software or</i> | <i>Goal of the division that this resource will support</i> | <i>Action that this resource will help complete.</i> | <i>How will the resource support the goals of the division?</i> | <i>Which cati describes t request?<br/>a) staffi<br/>b) techn<br/>c) instru<br/>equip<br/>d) non-i</i> |

# Next Steps

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Division /  
Unit-level  
Annual  
Planning

- By **January 28<sup>th</sup>**, enter divisional-level annual plans in Nuventive.

Office /  
Program-level  
Annual  
Planning

- Before **February 25<sup>th</sup>**, Deans/Managers meet with Office/Program Annual Planners to kick-off Office/Program-level annual planning.
- By **March 25<sup>th</sup>**, Office/Programs complete Word worksheet with annual plans
- By **April 1<sup>st</sup>**, Nuventive training with Office/Program Annual Planners
- By **April 15<sup>th</sup>**, Office/Programs enter annual plans in Nuventive.

# Contact for Support

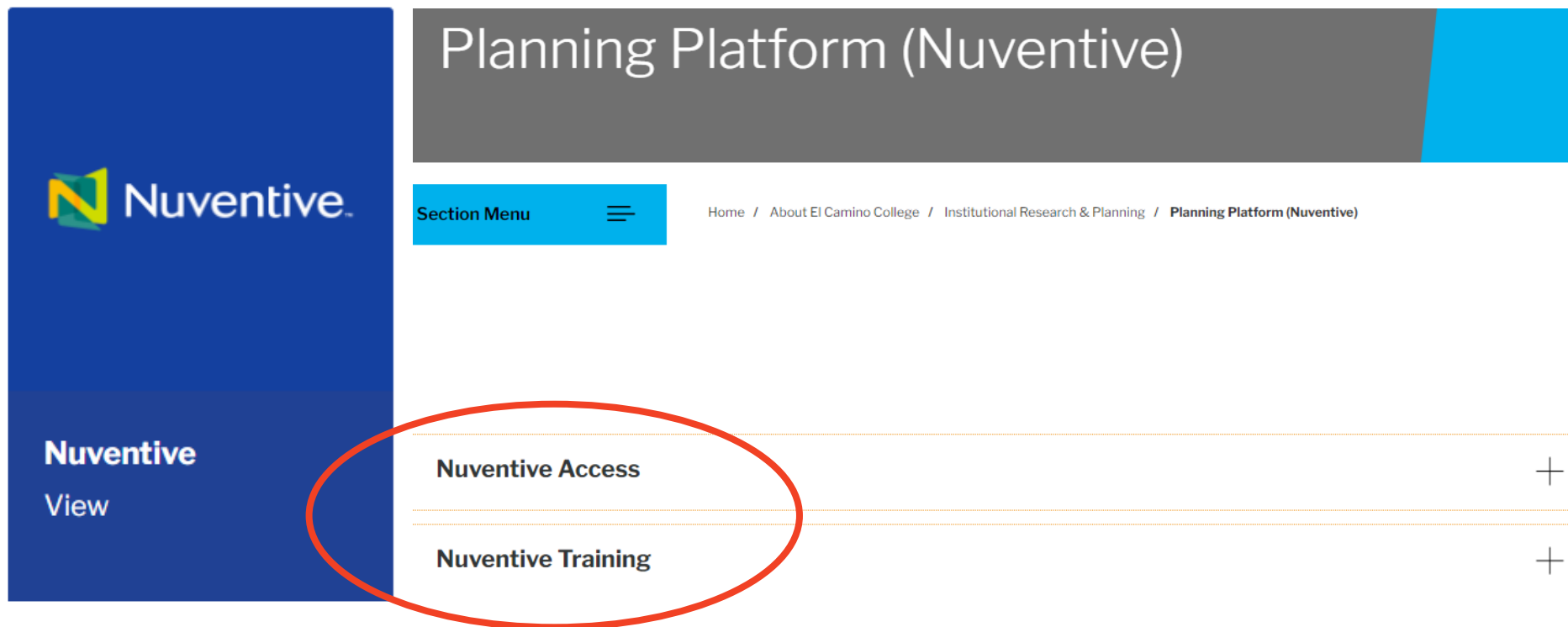
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Contact for questions related to Nuventive access & support: Diora Hong ([dhong@elcamino.edu](mailto:dhong@elcamino.edu))

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

# 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](#)







Thank You  
Questions?