

FY2022-23 Annual Planning Nuventive Improve Training

JANUARY 14, 2022

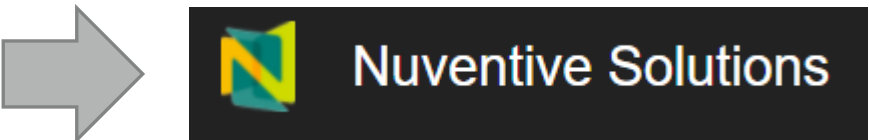
Purpose of this meeting

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

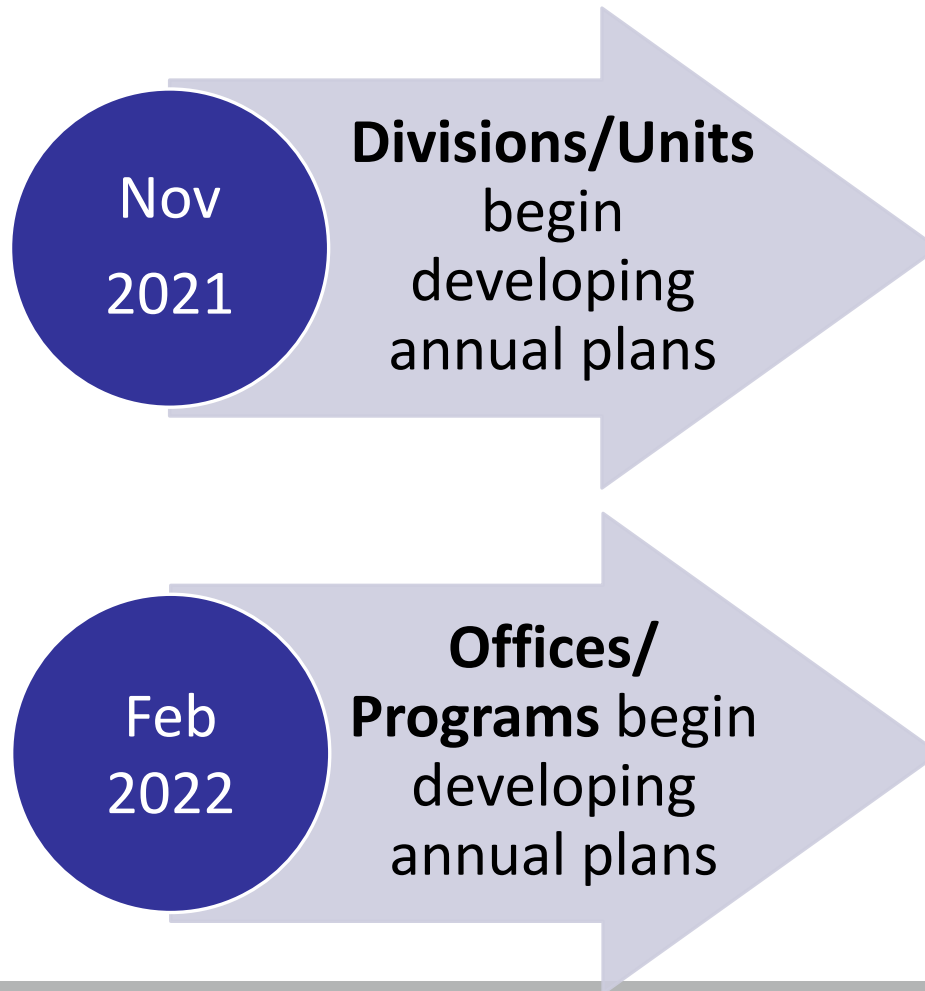
Purpose of this worksheet: To document annual plans so the annual plans are ready to input into Nuventive. For internal use only within the division to help with brainstorming and internal discussions. These completed worksheets do not need to be submitted to IRP. *Please refer to the Annual Planning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

Goal Title	Goal Description	Metric	Actions (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>

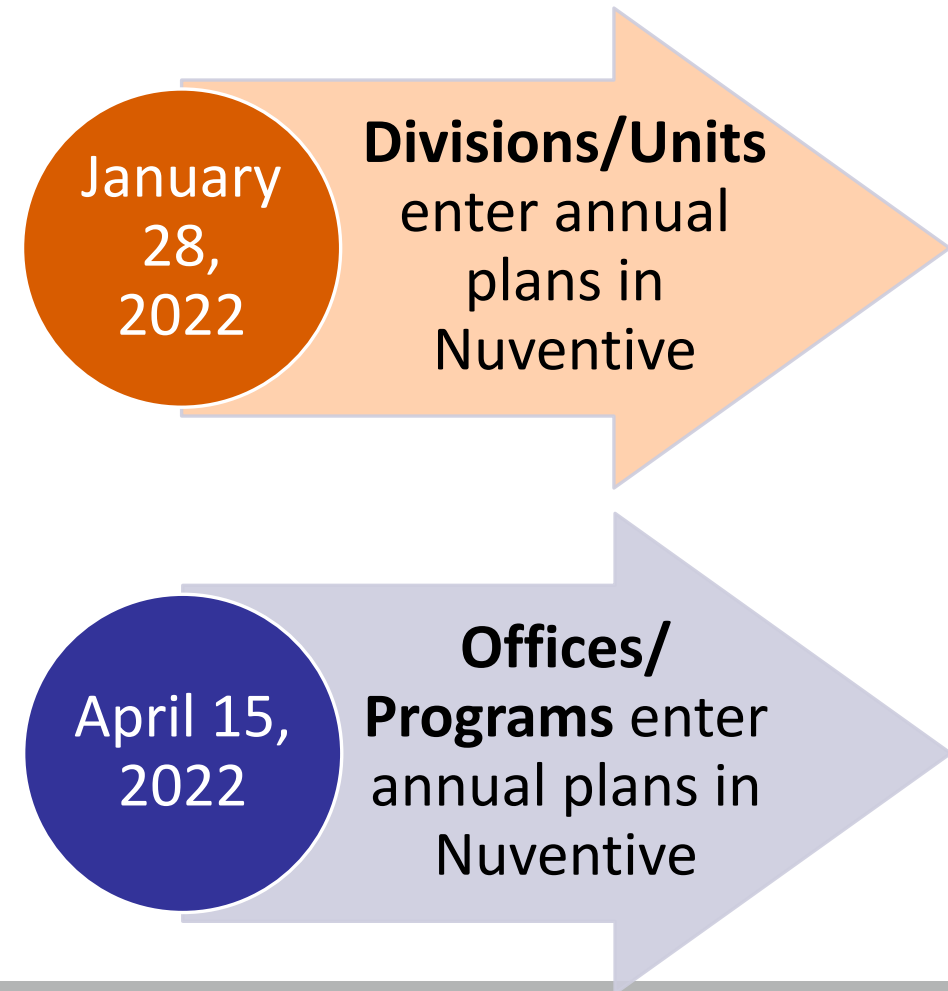


Timeline and Process to Date

Annual Planning worksheet (MS Word)



New Nuventive annual planning forms



Nuventive Access & Log-in


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



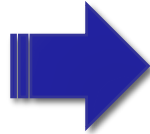
Pick an account



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.



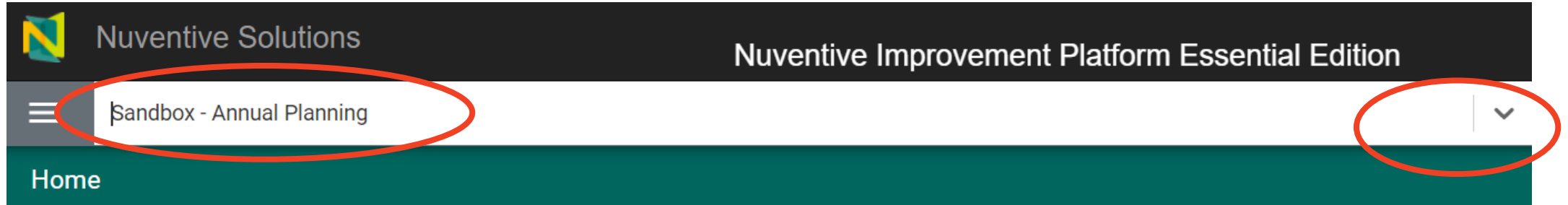
Don't show this again

No

Yes

Select Your Office Name

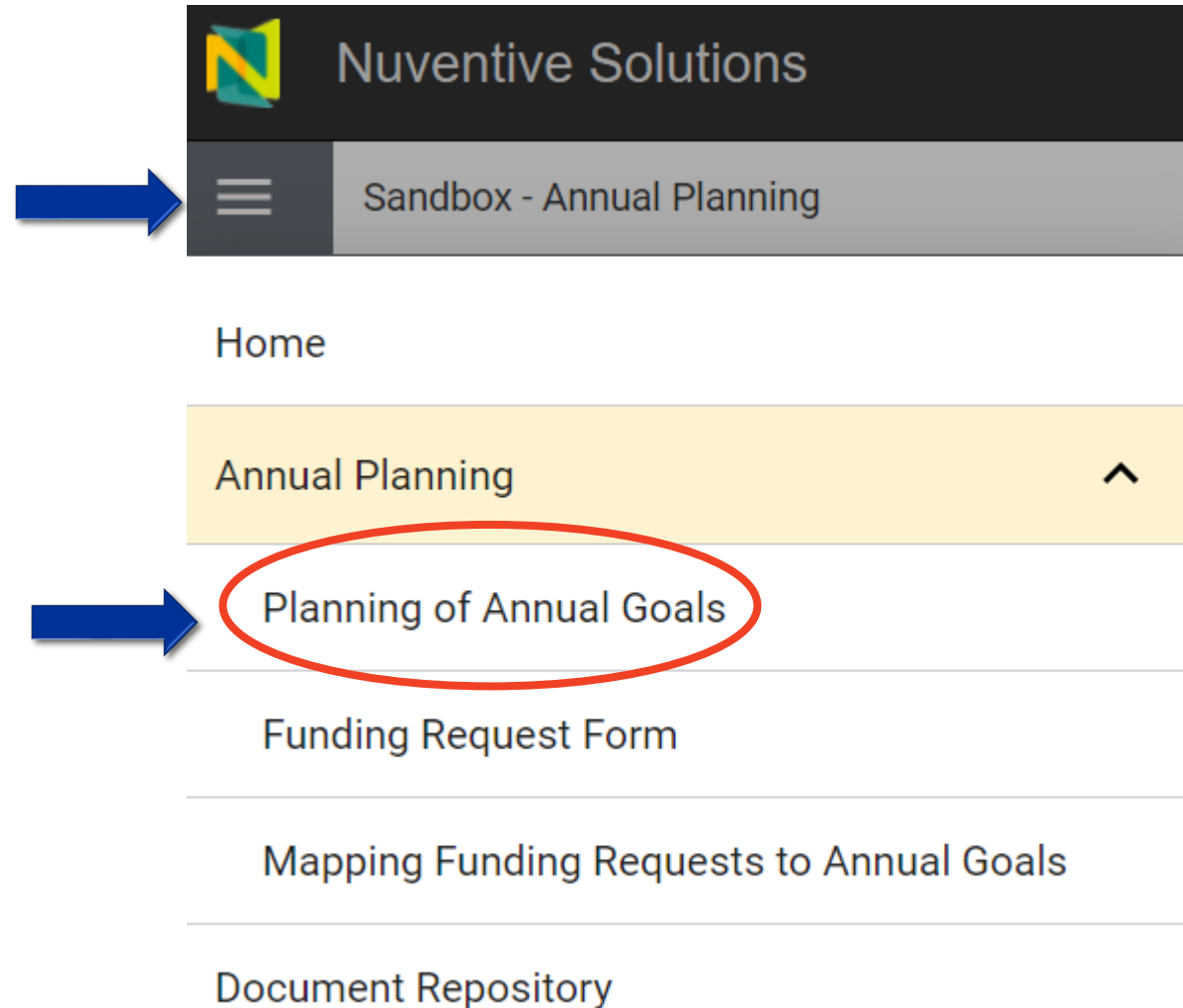
Select your division or program/office name by either typing in the name or by clicking the dropdown arrow to view the list.



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 search bar is visible, containing the text "Sandbox - Annual Planning". To the right of the search bar is a dropdown arrow icon. Both the search bar and the dropdown arrow are circled in red. Below the search bar, a dark green bar contains 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


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

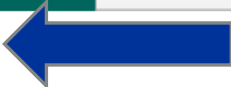
Entering Goals

 Institutional Research and Planning


Annual Planning


New Annual Goal

■ ANNUAL GOAL

Annual Goal Title *  * Indicates a required field

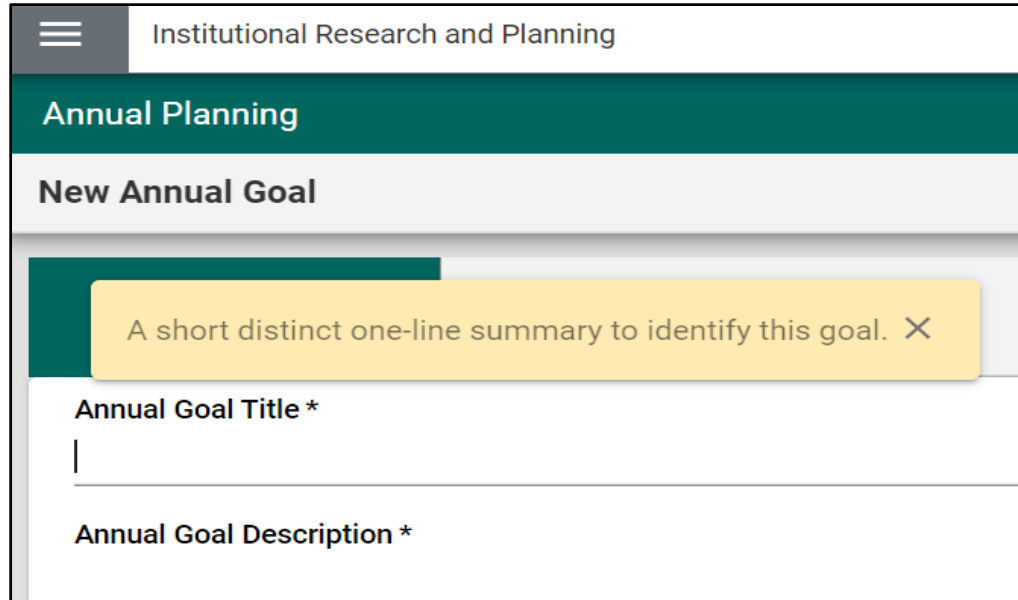
Annual Goal Description *

Annual Goal Status * 

Annual Planning Year(s) * 


If applicable, how was this goal informed by data?

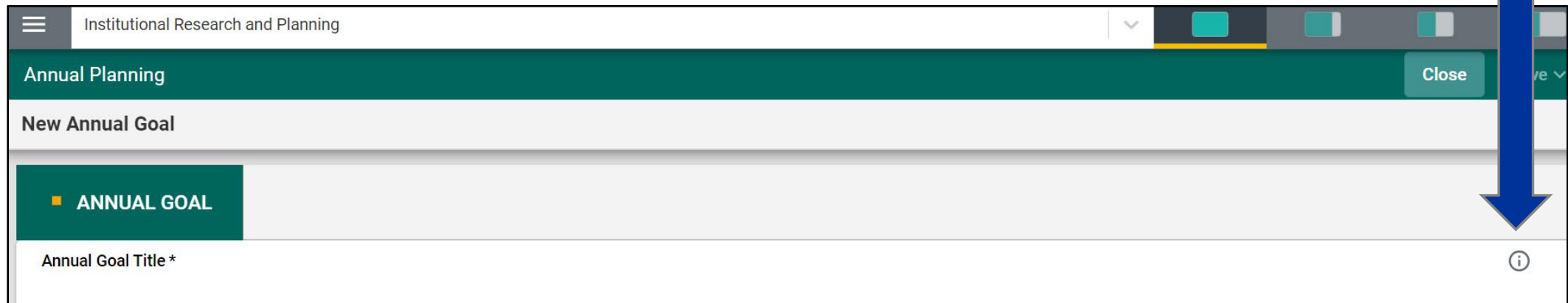
Entering Goals



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 Title' field, containing the text: 'A short distinct one-line summary to identify this goal. X'. Below the tooltip are two input fields: 'Annual Goal Title *' and 'Annual Goal Description *'.

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 .



This screenshot shows the same 'New Annual Goal' form, but the yellow tooltip is gone. The 'Annual Goal Title' field now has a small information icon (i) at its bottom right corner. A blue arrow points from the text above to this icon. The top right of the form has a 'Close' button and a dropdown menu.

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 (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 (optional for Divisions)
	Describe the resources needed to complete the actions and achieve the goals of the division/unit. (e.g., staff with specialized skills, access to software or equipment)

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



Adding & Attaching Documents (Document Repository)

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 area shows a document titled 'Fall 2021 Withdrawal Survey: Results Preview' with the El Camino College logo and the date 'DECEMBER 2021'. The document is displayed in a preview mode with a toolbar at the top right containing icons for information, menu, close, and a red circle highlighting download and print icons. The sidebar on the left shows the 'Annual Planning > Planning of Annual Goals' section with a search bar and a list of goals. The 'ANNUAL GOAL' section is expanded, showing details for 'Minimize Withdrawals'.

Annual Planning > Planning of Annual Goals Close Save

Q Minimize Withdrawals

ANNUAL GOAL

Annual Goal Title *
Minimize Withdrawals

Annual Goal Description *
Test Goal Description

Annual Goal Status *
Active

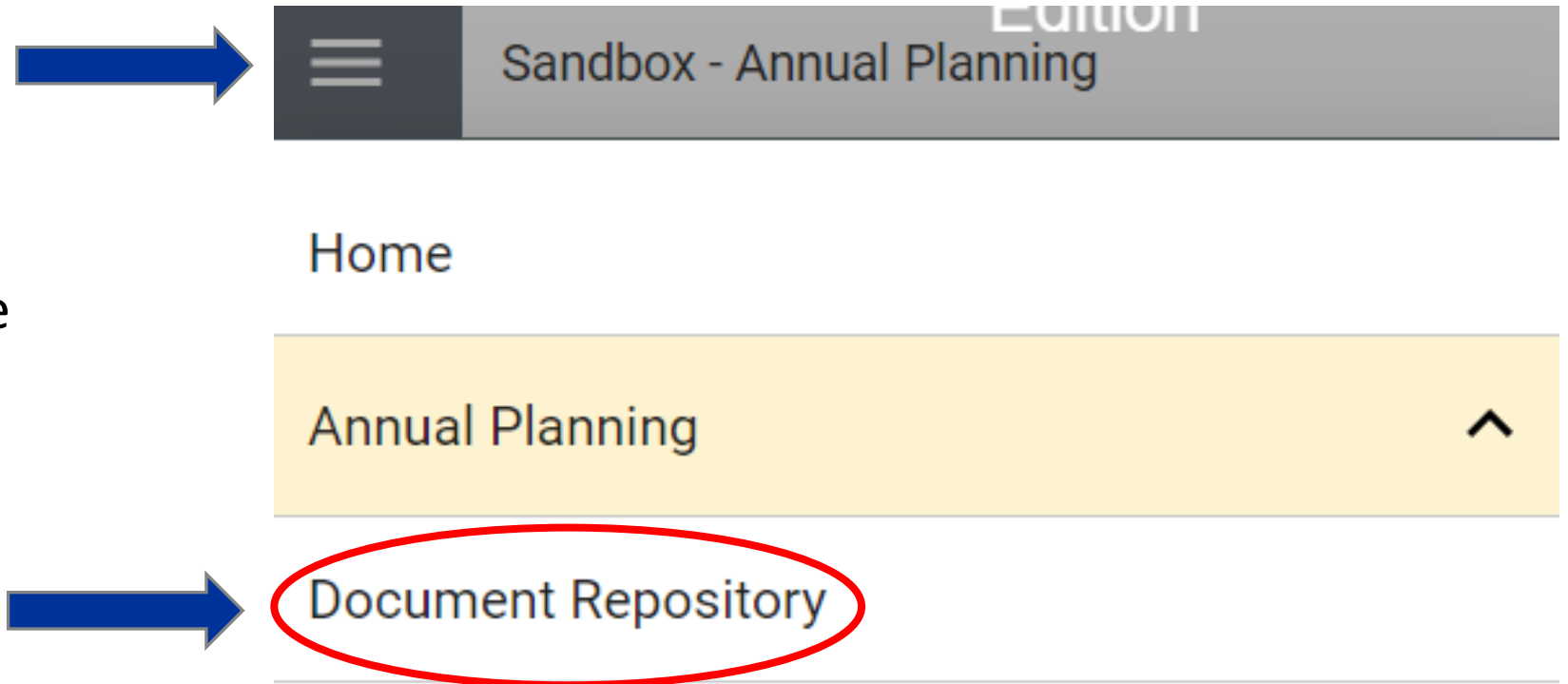
Annual Planning Year(s) *
2022-2023

SSSP/SE/B... 1 / 9 48% + -

Fall 2021 Withdrawal Survey: Results Preview
DECEMBER 2021

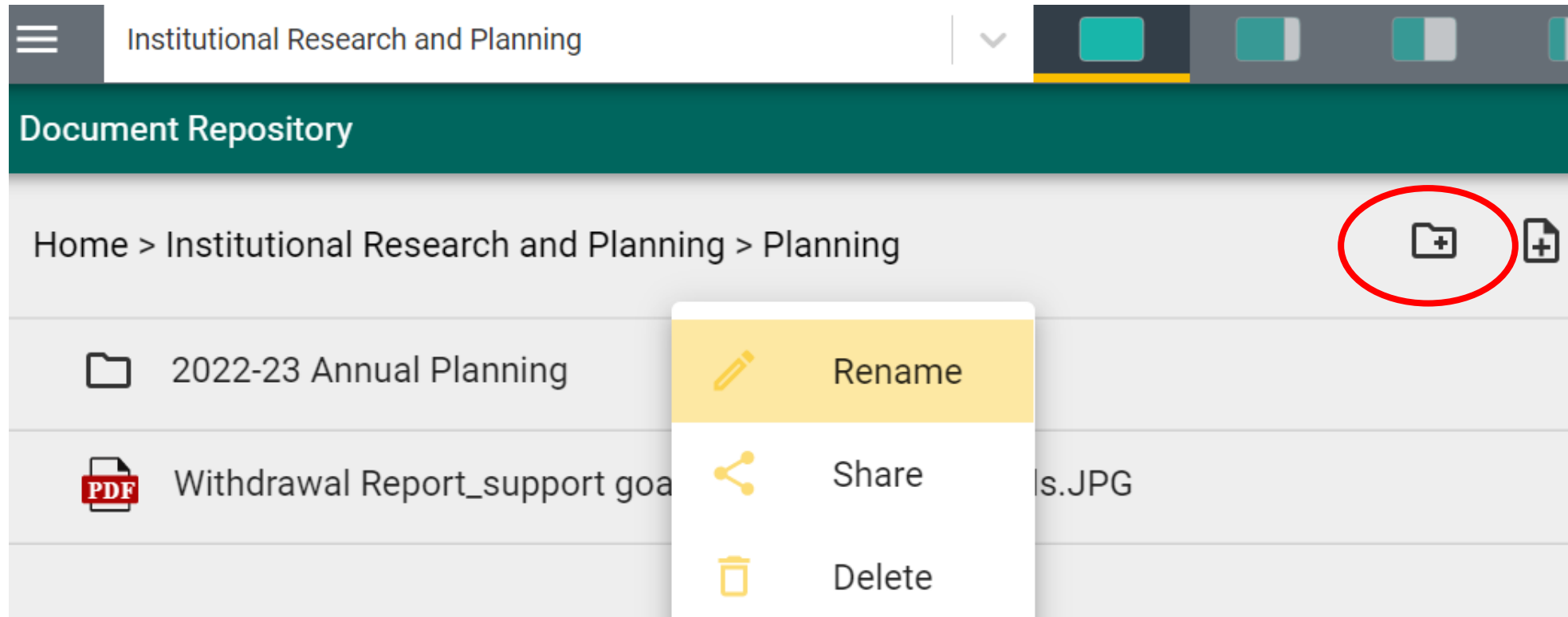
Document Repository

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



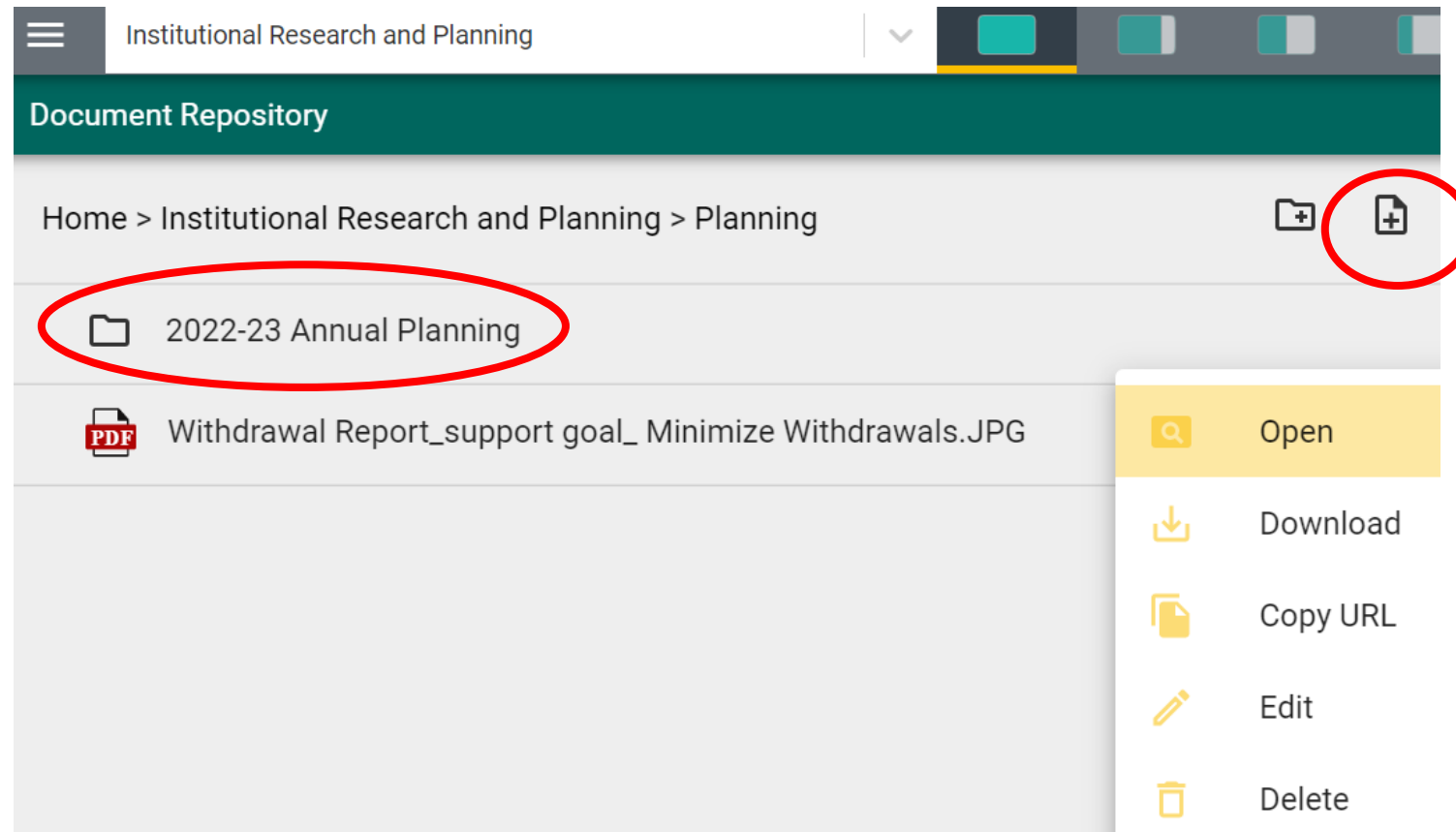
Document Repository: Creating Folders

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 add the document, then click  to add.



Document Repository: Adding Documents

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

Add Document(s) to 2022-23 Annual Planning

Choose Files

 No file chosen

Urls

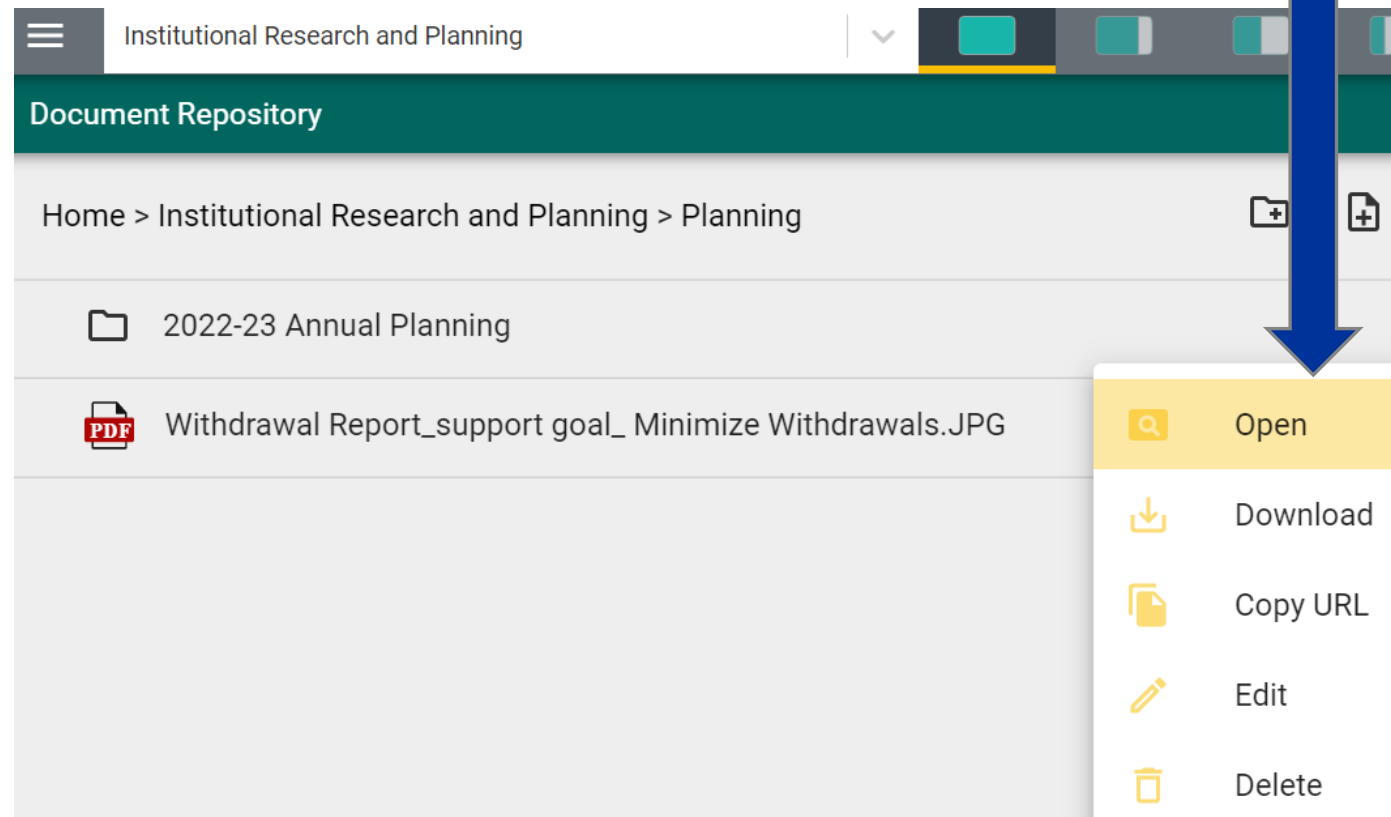
Name *	Url *	Description
<input type="text"/>	<input type="text"/>	<input type="text"/>

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

Click on  to attach a document.

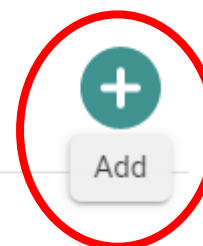
■ ANNUAL GOAL

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  

ADD document

Create a folder

 > SANDBOX - ANNUAL PLANNING > GENERAL

 Withdrawal Survey Report




  Undertanding and Minimizing Withdrawals.JPG


The documents will show here after they've 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

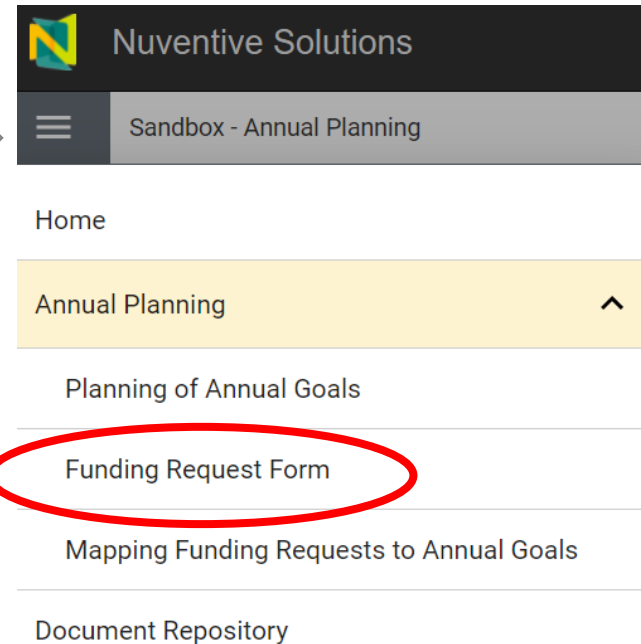
R If a budget augmentation (i.e., an increase to the current total annual budget) is needed to support this
T goal, please complete a "Funding Request" form."

Is a budget augmentation needed to support this goal? *

Yes

If you select "yes" to this 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

Saving Goals

New Annual Planning > Planning of Annual Goals

Close Save ▾

Test Goal

ANNUAL GOAL

Annual Goal Title *

Test Goal

Annual Goal Description *

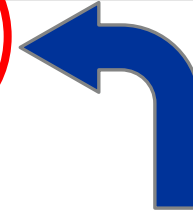
Test goal description

Annual Goal Status *

Active ▾ ⓘ

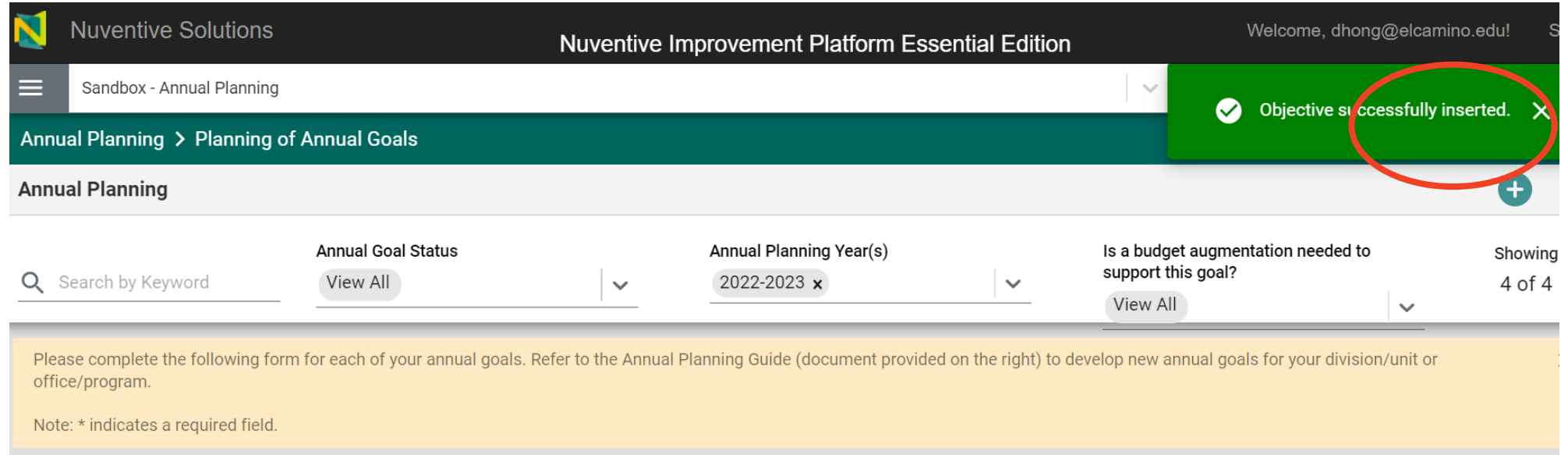
Annual Planning Year(s) *

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 is a search bar labeled 'Search by Keyword' and several filter dropdowns: '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'). The bottom right corner indicates 'Showing 4 of 4' items. A yellow informational banner at the bottom provides instructions on completing the annual goals form and refers to an 'Annual Planning Guide'.

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

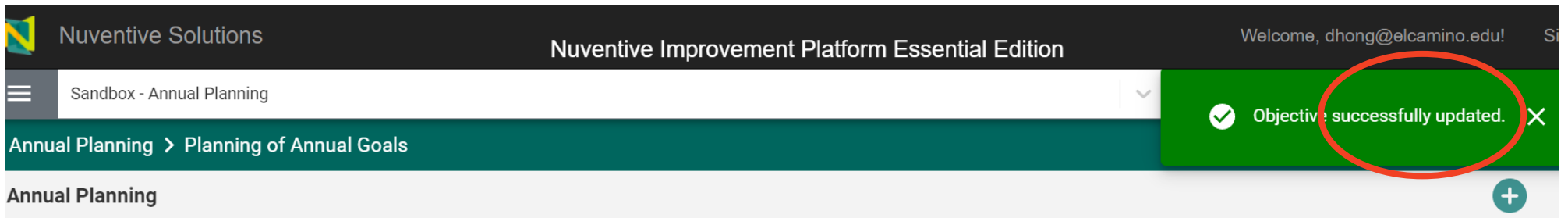
Annual Planning Year(s): 2022-2023

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 bar, sidebar, filters, and informational banner, 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

Do you need to complete a Funding Request Form?

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

A title for this funding request. Shortened description to help in the review of this request for approval.

Resources (optional for Divisions)	Goal Title	Action	Rationale	Funding category	Estimated cost per category
<i>Describe the resources needed to complete the actions and achieve the goals of the division/unit (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? a) staffing, b) technology/software, c) instructional equipment, d) non-instructional</i>	<i>List \$ dollar amount needed above and beyond current budget allocations</i>

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.

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

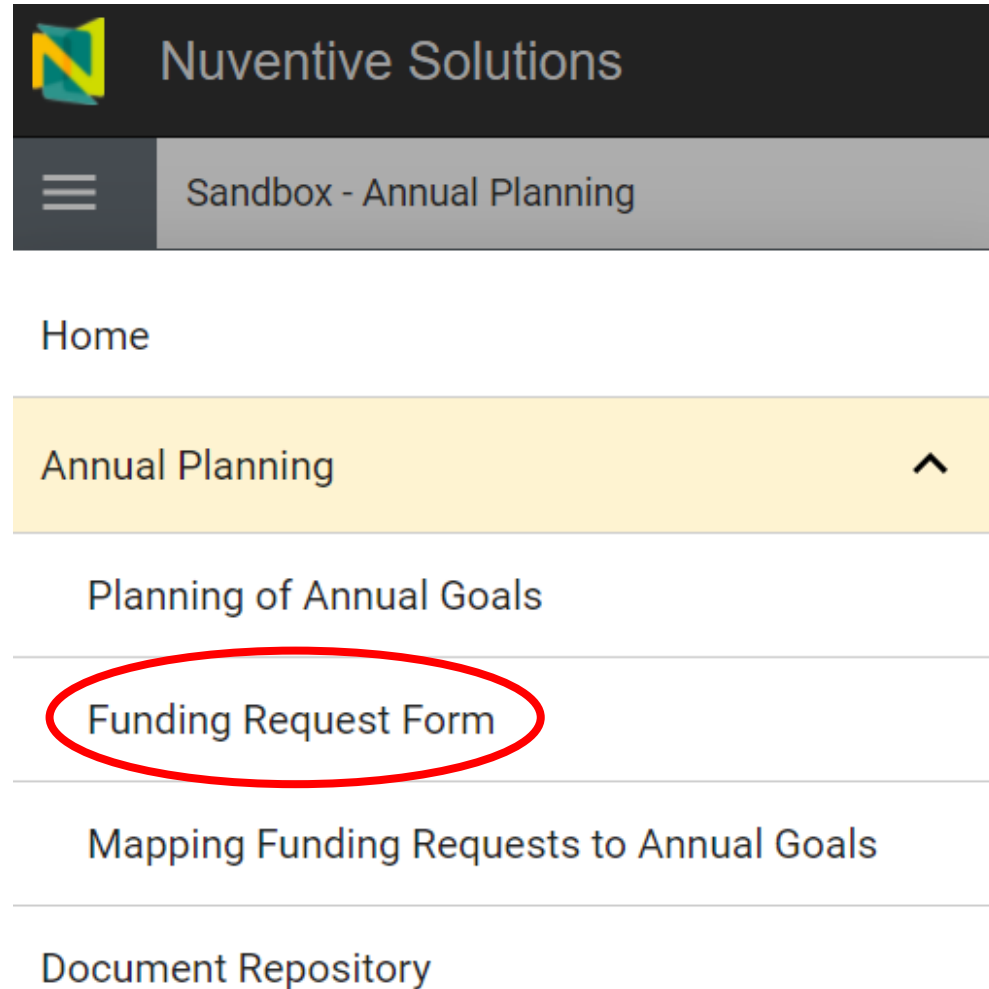
Rationale for funding request

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

Resources (optional for Divisions)	Goal Title	Action	Rationale	Funding category	Estimated cost per category	
<i>Describe the resources needed to complete the actions and achieve the goals of the division/unit. (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? a) staffing, b) technology/software, c) instructional equipment, d) non-instructional</i>	<i>List \$ dollar amount needed above and beyond current budget allocations</i>	<i></i>

Funding Request Form

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



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 the form and save your work.

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” 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

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

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.

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** + ⋮
Linked

Search by Keyword	Full-time outreach s...
Minimize Withdrawals	L
ACDA conference attendance by ECC Dance program faculty and staff	L

Do Not Use 📝 Add/Edit Note

Mapping Funding Request to Goal

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

Funding Request

Goal

Resources (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. (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 cat describes i request? a) staffi b) techr c) instr equip d) non-i</i>

Next Steps

Division /
Unit-level
Annual
Planning

- By **January 28th**, enter divisional-level annual plans in Nuventive.

Office /
Program-level
Annual
Planning

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

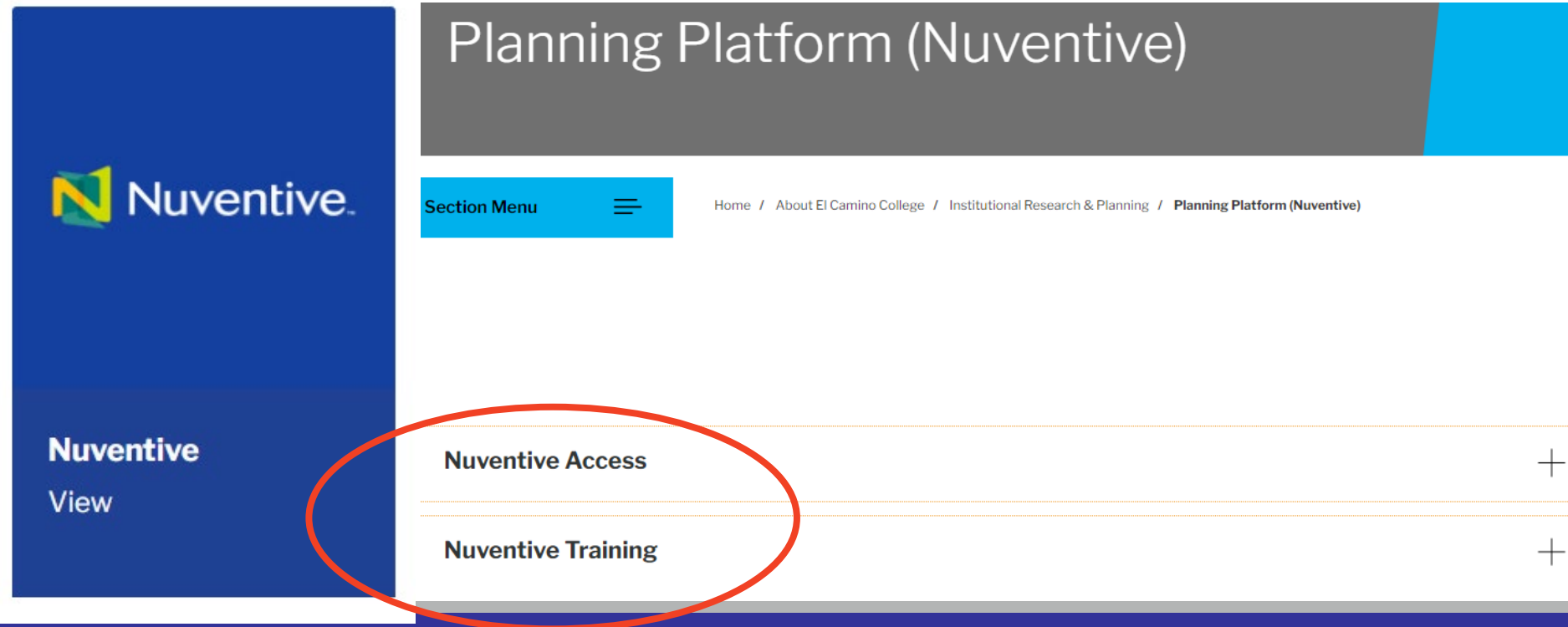
Contact for Support

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)

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?