

FY2022-23 Annual Planning
NEW Nuventive Improve
Training

JANUARY 14, 2022

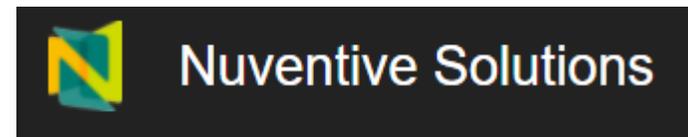
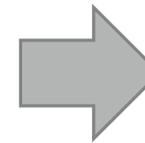
Purpose of this meeting

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

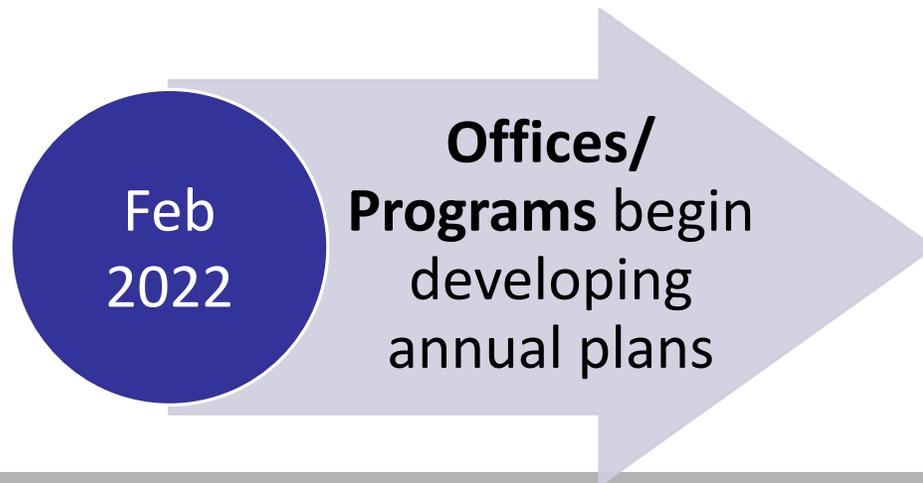
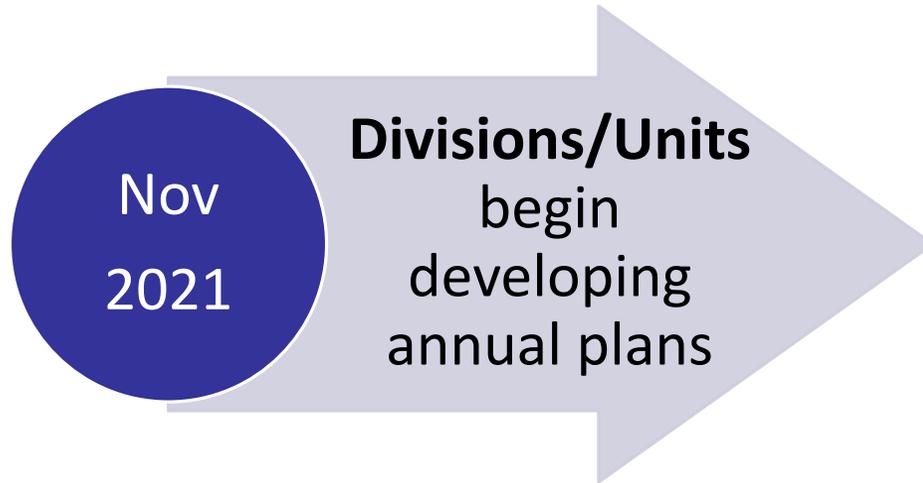
Purpose of this worksheet: To document annual plans so the annual plans are ready to input into Nuventive. For internal use only within the division to help with brainstorming and internal discussions. These completed worksheets do not need to be submitted to IRP. Please refer to the Annual Planning 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>

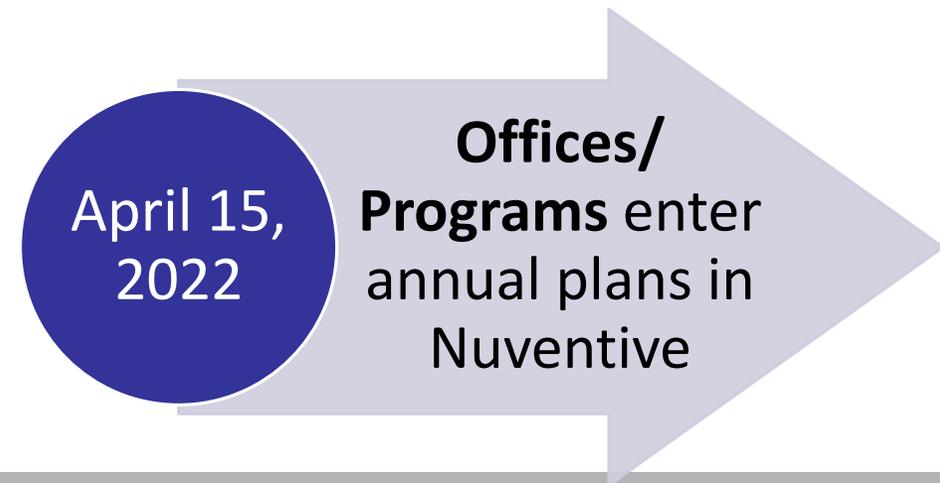


Timeline and Process to Date

Annual Planning worksheet (MS Word)



New Nuventive annual planning forms



Nuventive Access & Log-in

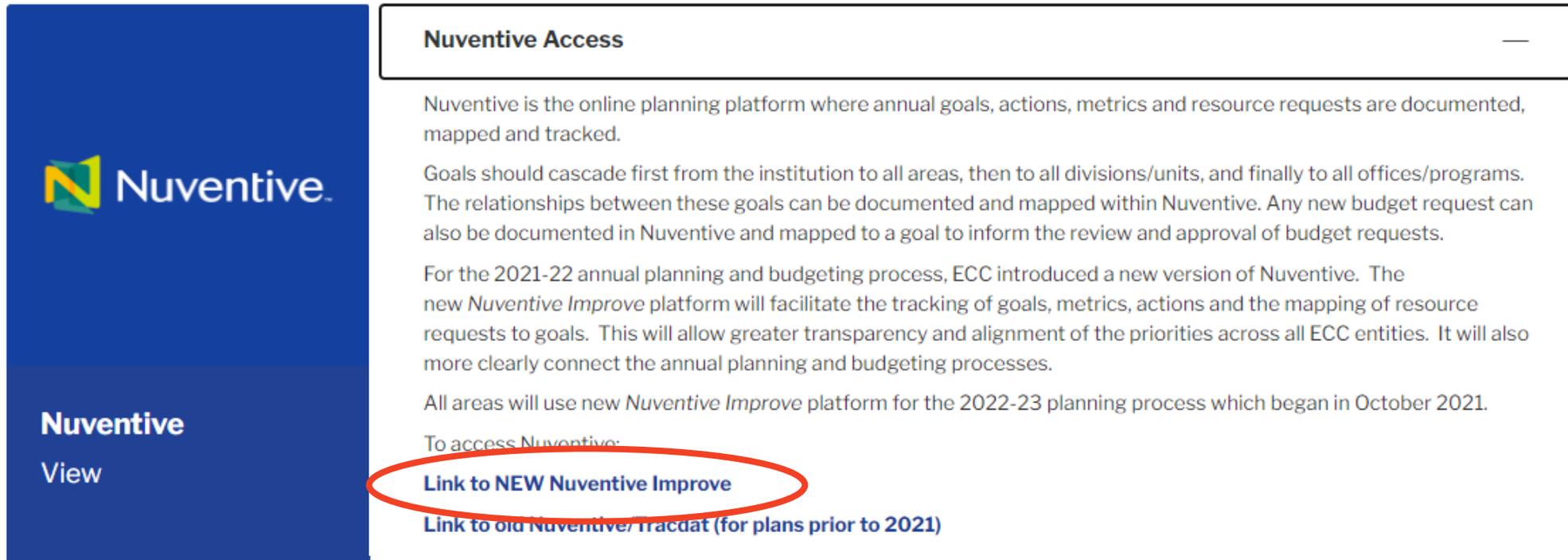
Logging in with URL

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 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



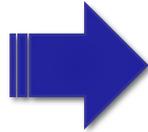
Pick an account



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.

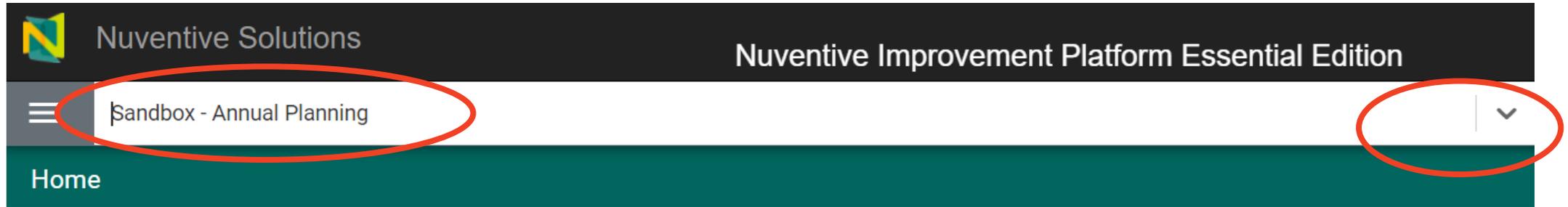
Don't show this again

No

Yes

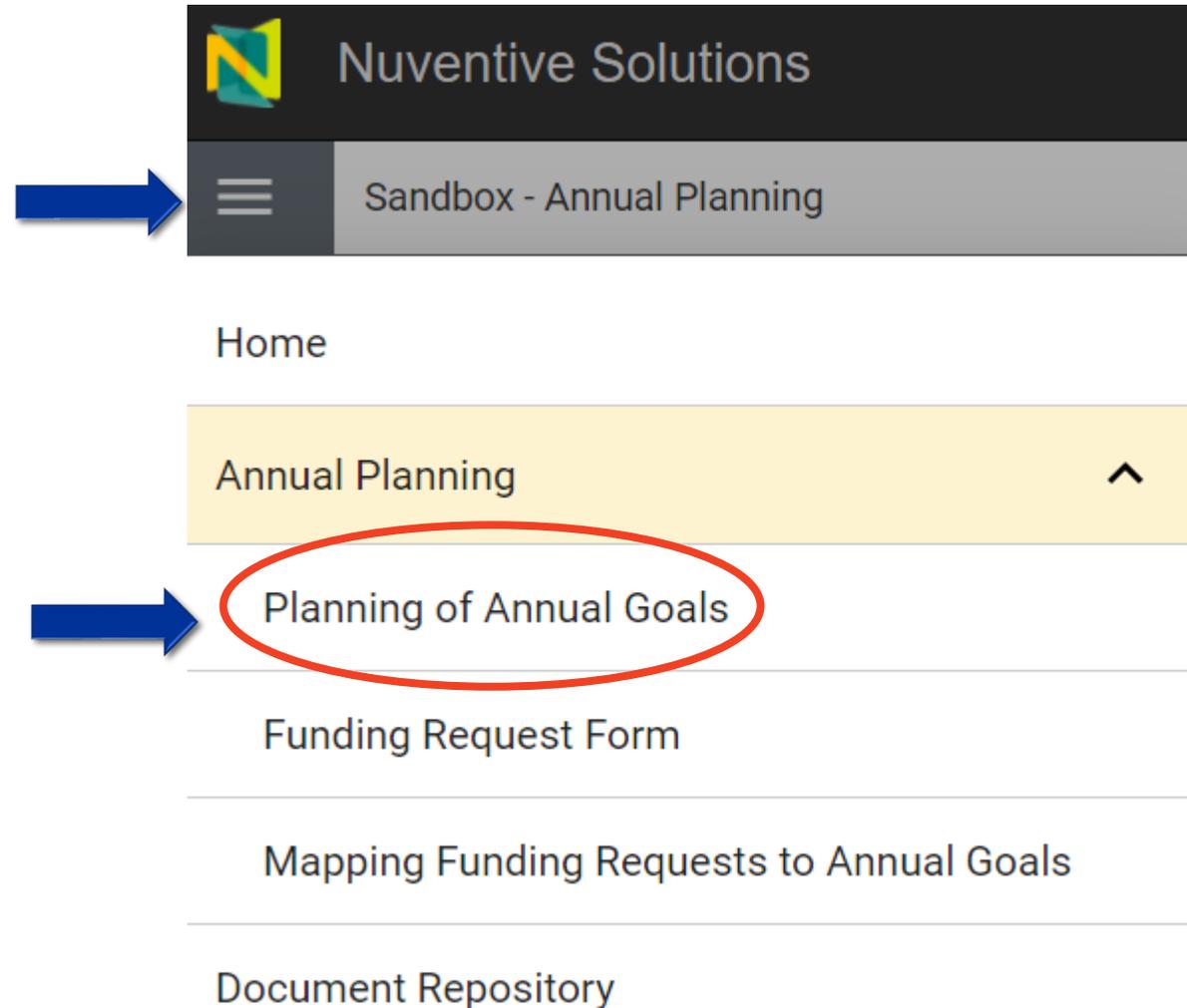
Select Your Office Name

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



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 Annual Planning Year(s) Are additional funds needed to support this goal? 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

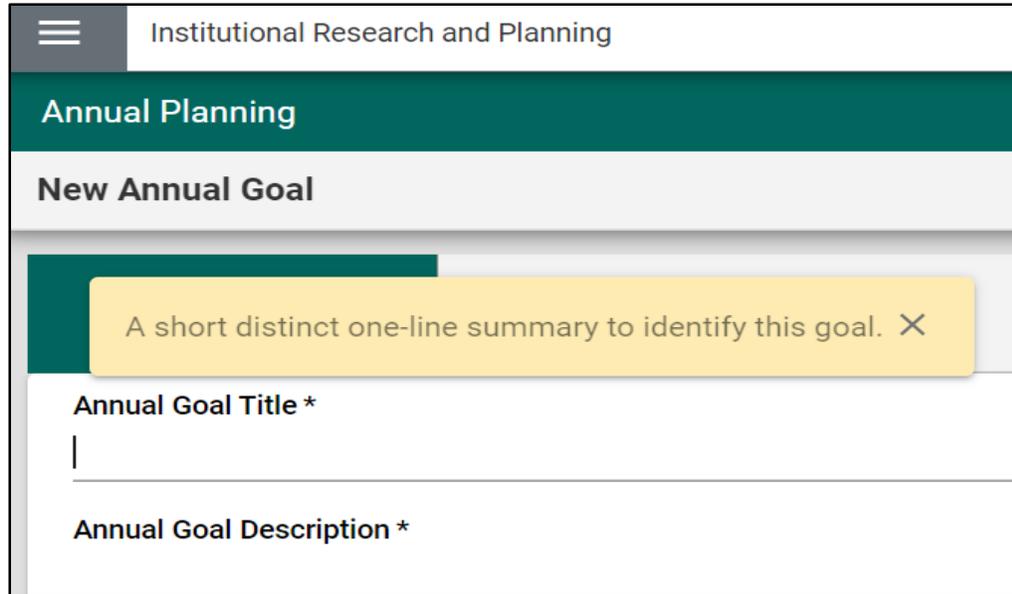
Annual Goal Description *

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

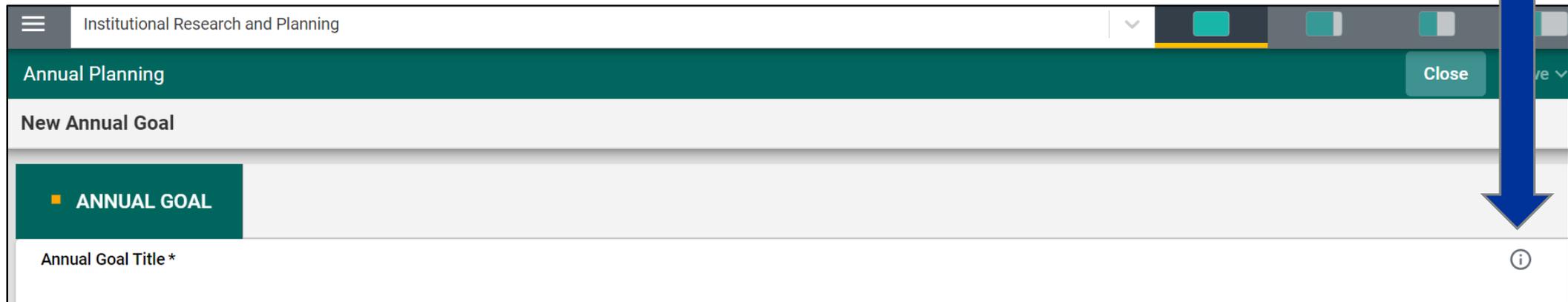
A short distinct one-line summary to identify this goal. ✕

Annual Goal Title *

Annual Goal Description *

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

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



Institutional Research and Planning

Annual Planning

New Annual Goal

Close

ANNUAL GOAL

Annual Goal Title *



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)		
<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.</i>		
	<table border="1"> <thead> <tr> <th data-bbox="1854 785 2178 863">Resources (optional for Divisions)</th> </tr> </thead> <tbody> <tr> <td data-bbox="1854 863 2178 1295"> <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 equipment)</i> </td> </tr> </tbody> </table>	Resources (optional for Divisions)	<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 equipment)</i>
Resources (optional for Divisions)			
<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 equipment)</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



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.

The screenshot displays the 'Sandbox - Annual Planning' interface. On the left, a sidebar contains an 'ANNUAL GOAL' form for 'Minimize Withdrawals'. 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
- If applicable, how was this goal informed by data?**

The right sidebar features a grid of data and document thumbnails. A red circle highlights the top navigation bar of this sidebar, which includes several colored buttons (teal, grey, white, grey) for viewing options. The thumbnails include:

- Dashboards for Annual Planning**: A document with text and links.
- Student Services Metrics Tool**: A document with tables of metrics.
- Fall 2021 Withdrawal Survey: Results Preview**: A document with a logo and title.
- 2022-23 Annual Goals**: A document with the title 'COLLEGE'S ANNUAL GOALS AND CONTINGENCY PLAN GOALS'.

Data and Document

Download or print documents by clicking on the appropriate icons.

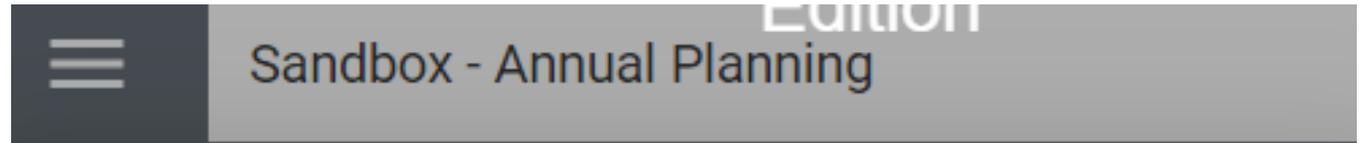
The screenshot displays a web application interface. On the left, a sidebar contains a form titled "Minimize Withdrawals" under the heading "ANNUAL GOAL". The form fields are:

- 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 shown. The document header includes the El Camino College logo and the title "Fall 2021 Withdrawal Survey: Results Preview" with the date "DECEMBER 2021". The browser's toolbar at the top right of the preview area shows a download icon and a print icon, both of which are circled in red.

Document Repository

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

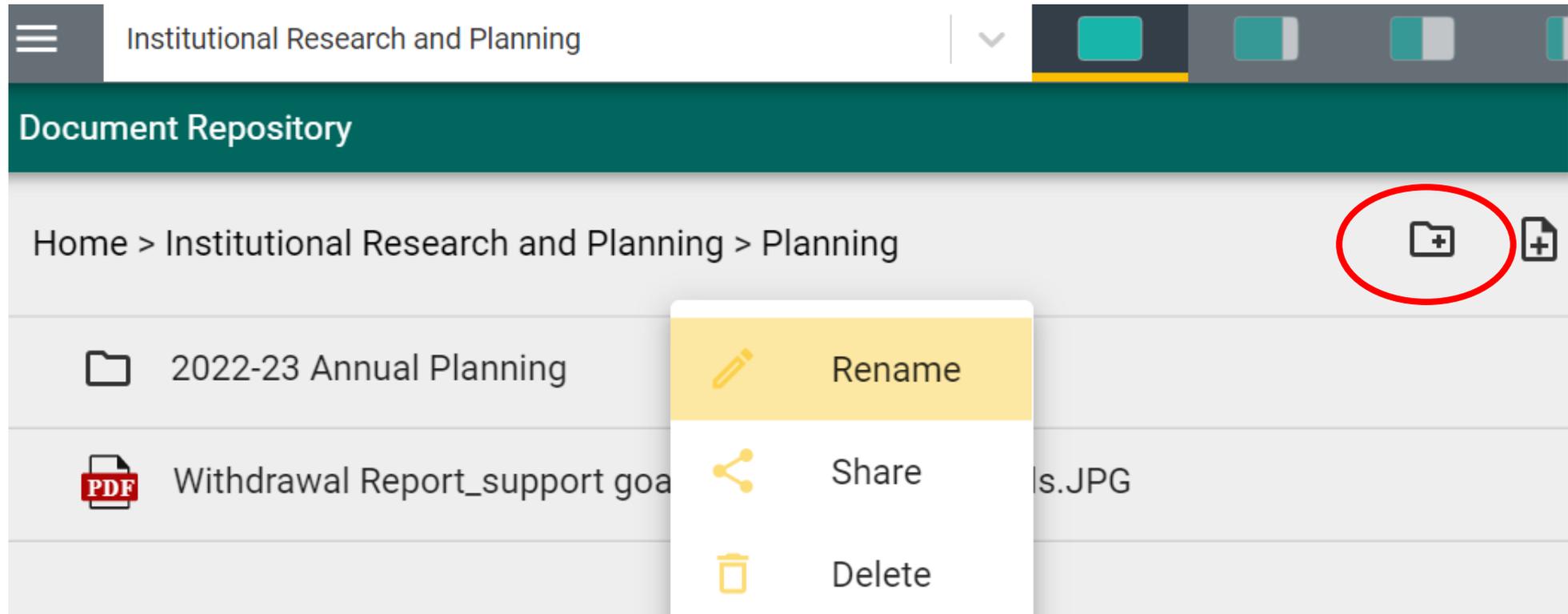


Home



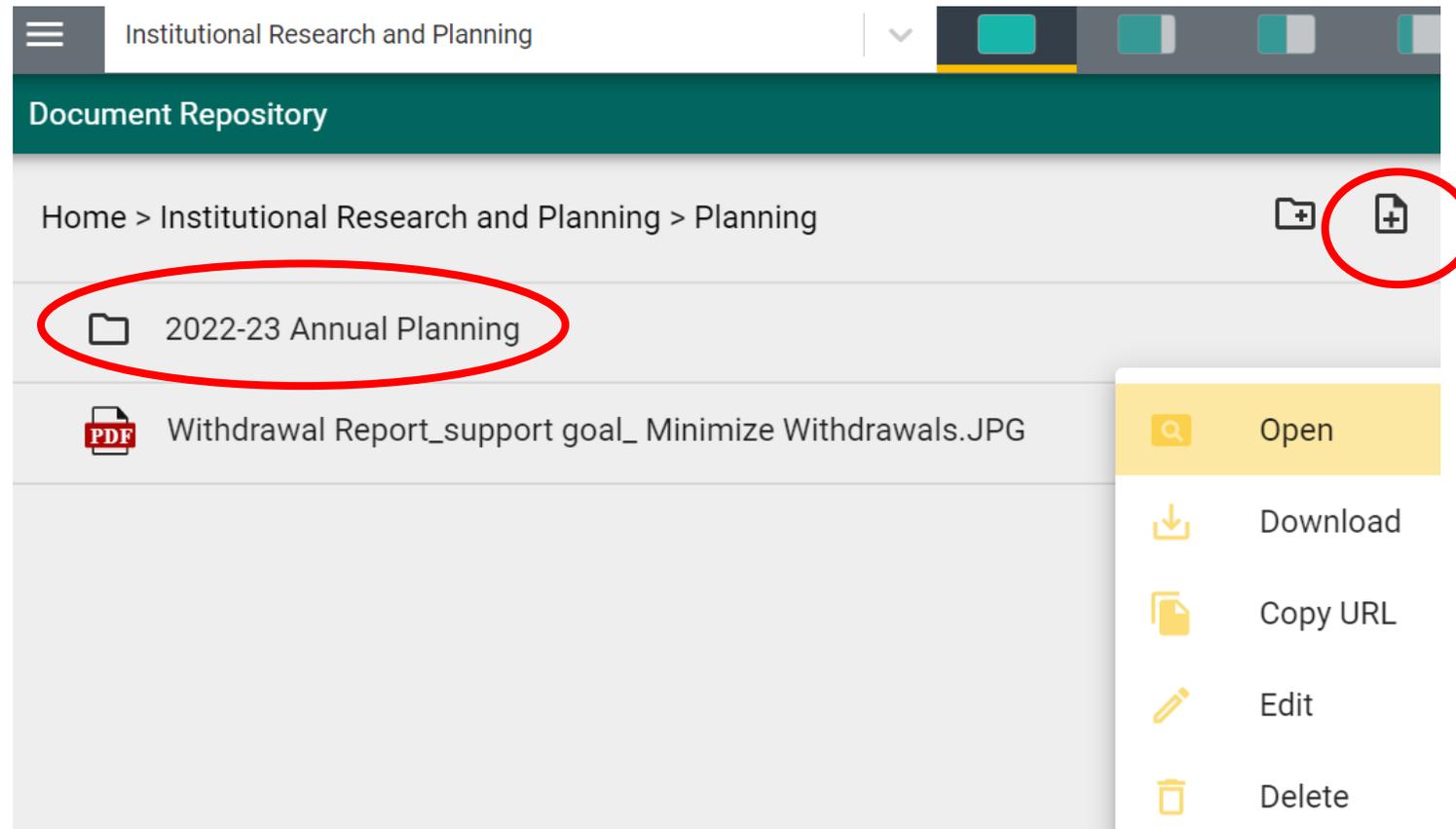
Document Repository: Creating Folders

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

Choose Files No file chosen

Urls

Name *

Url *

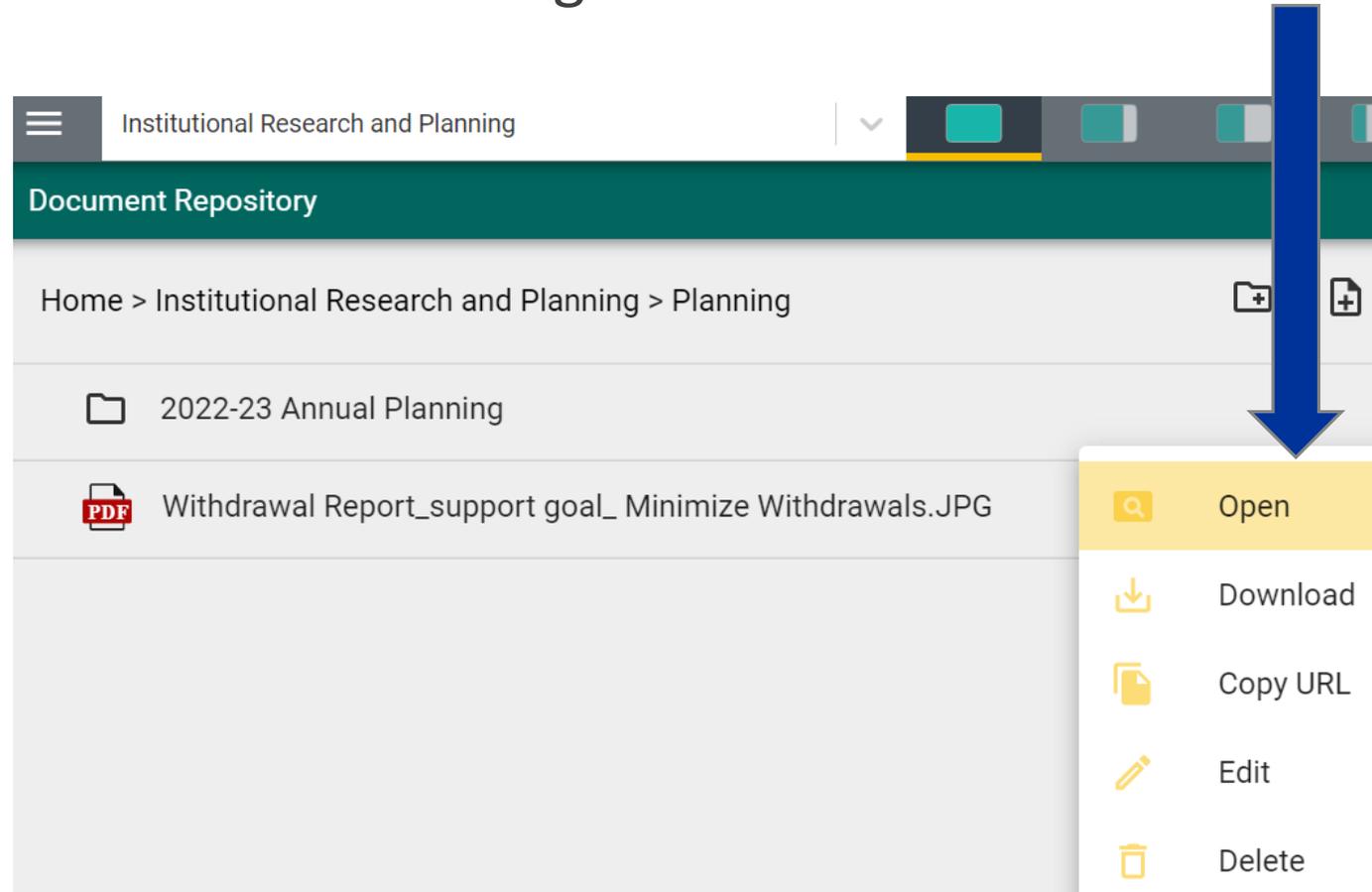
Description

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

Click on  to attach a document.

■ **ANNUAL GOAL**

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

Document Name	Document Description	 Add
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 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”.

The screenshot shows a web interface for a document repository. At the top, the title "Document Relate Repository" is displayed. To its right, there are three icons: a document with a plus sign, a folder, and a close (X) button. The "ATTACH" text is circled in red. Below the title bar, a breadcrumb trail shows a home icon followed by "SANDBOX - ANNUAL PLANNING" and "GENERAL". The main content area shows a folder icon and the text "Withdrawal Survey Report". Below this, a document titled "Undertanding and Minimizing Withdrawals.JPG" is highlighted in yellow and has a checkmark icon to its left.

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
Undertanding and Minimizing Withdrawals.JPG	Fall 2021 Withdrawal Survey Report

+

Add

X

Budget Augmentation

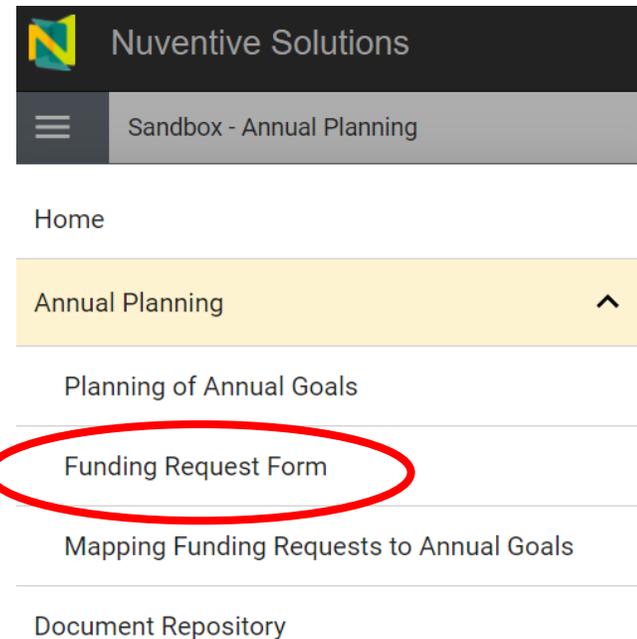
R
T If a budget augmentation (i.e., an increase to the current total annual budget) is needed to support this goal, please complete a "Funding Request" form.

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.



The screenshot shows the Nuventive Solutions interface. At the top, there is a header with the logo and the text "Nuventive Solutions". Below that is a sub-header "Sandbox - Annual Planning". The main content area is a list of menu items: "Home", "Annual Planning" (highlighted in yellow with an upward arrow), "Planning of Annual Goals", "Funding Request Form" (circled in red), "Mapping Funding Requests to Annual Goals", and "Document Repository".

Saving Your Annual Plan

Saving Goals

New Annual Planning > Planning of Annual Goals

Close Save ▾

Test Goal

ANNUAL GOAL

Annual Goal Title *
Test Goal

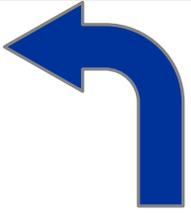
Annual Goal Description *
Test goal description

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. So be sure to complete all your fields, especially the required ones before saving.

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.

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.

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
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



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?</i> <i>a) staffing,</i> <i>b) technology/software,</i> <i>c) instructional equipment,</i> <i>d) non-instructional</i>	<i>List \$ dollar amount needed above and beyond current budget allocations</i>

Funding Request Form

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



A screenshot of the Nuventive Solutions web application interface. The top header is dark grey with the Nuventive Solutions logo and name. Below the header is a grey bar with a hamburger menu icon and the text 'Sandbox - Annual Planning'. The main content area is white and contains a list of menu items: 'Home', 'Annual Planning' (highlighted in yellow with an upward arrow), 'Planning of Annual Goals', 'Funding Request Form' (circled in red), 'Mapping Funding Requests to Annual Goals', and 'Document Repository'.

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

A
2

Please enter numbers only - no text. ✕

Amount Requested *
65,000

Funding Request Form

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

The screenshot shows a web application interface for 'Sandbox - Annual Planning'. The breadcrumb trail is 'Annual Planning > Funding Request Form'. The main heading is 'New Funding Request'. Below this, there are two tabs: 'FUNDING REQUEST' (which is active and highlighted in dark green) and 'MAPPING'. The form contains several input fields: a dropdown menu, a text area labeled 'Rationale for funding request', a greyed-out section titled 'For Manager Use Only' (circled in red), a dropdown menu labeled 'Funding request approved', and a text area labeled 'Funding request review – comments'. A user profile icon is visible in the top right corner.

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(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 + ⋮
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 cati describes t request? a) staffi b) techn c) instru 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](#)

Planning Platform (Nuventive)

Nuventive

Nuventive View

Section Menu

Home / About El Camino College / Institutional Research & Planning / Planning Platform (Nuventive)

- Nuventive Access +
- Nuventive Training +



Thank You
Questions?