FY2023-24 Annual Planning

NEW Nuventive Improve Training

OCTOBER 21, 2022

Purpose of this meeting

To provide an overview of:

- Key changes to the 2023-24 Annual Planning & Budgeting process

- The 2023-24 College Goals

- How to navigate the Nuventive Annual Planning module

Key changes to the
2023-24 Annual Planning & Budgeting Process

PLANNING

Establish Annual Goals:
- For 2023-24, everyone will work towards the same goals provided by the College.
- No new annual goals expected from the areas, divisions/units, office/programs.

BUDGETING

Aligning Funding to Annual Goals:
- Review previously submitted funding requests that were not funded in 2022-23. Resubmit funding requests that support the 2023-24 College goals.
- Submit new funding requests to support the 2023-24 College goals.

2023-24 College Goals

Increase FTES

(full-time equivalent students)

Increase yield rate

(where yield rate: Percent of students who enroll in ECC after having been offered admission)

Increase student retention or course completion

Increase degree or certificate completion or transfers

Organizational Effectiveness

(ensure operations continue efficiently for the sustainability of the College)

Risk, Safety, Liability

* Priority every year (not just 2023-24)

Enrollment & Retention

* Annual goals have already been entered into Nuventive

NOTE: Resubmitting Funding Requests

- To resubmit a funding request: update the submission **year** and **rationale** to clarify alignment to the 2023-24 College goals

- Requests that require more than these two changes may be submitted as a new request

- Resubmitted requests and new requests will be reviewed and prioritized the same way.

Nuventive Overview

- How to log-into & Navigate Nuventive

- Resubmitting & Entering New Funding Requests

- Mapping Funding Requests to College-wide goals.
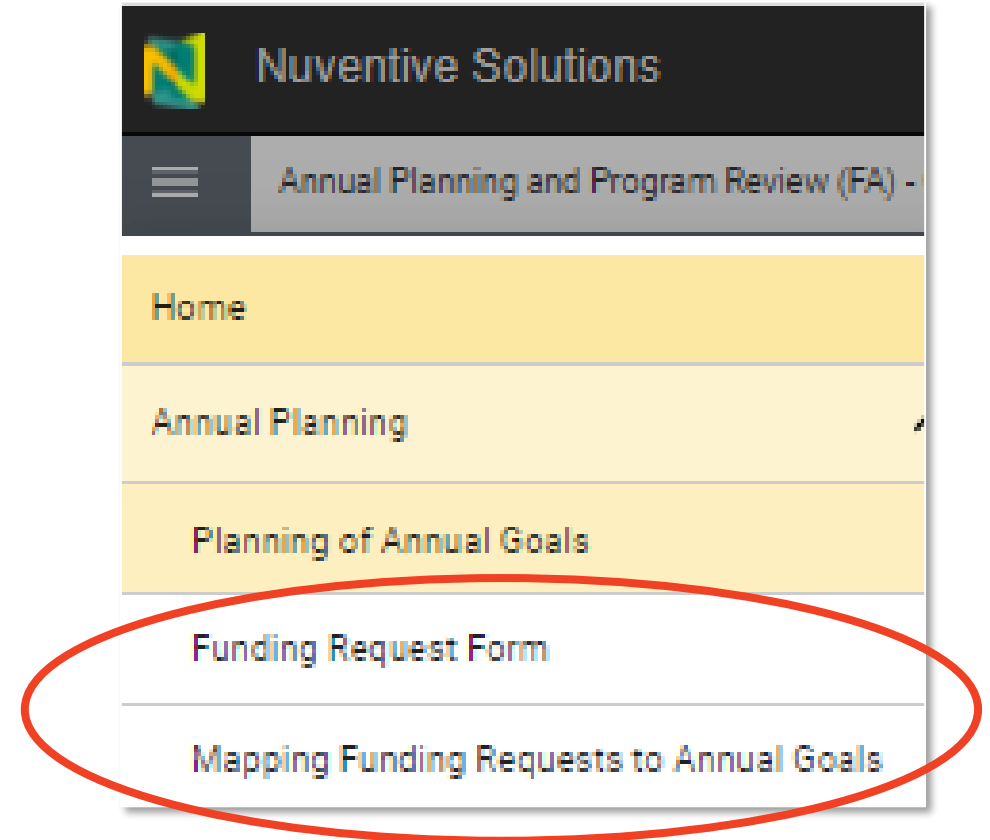
Nuventive Access & Log-in

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.
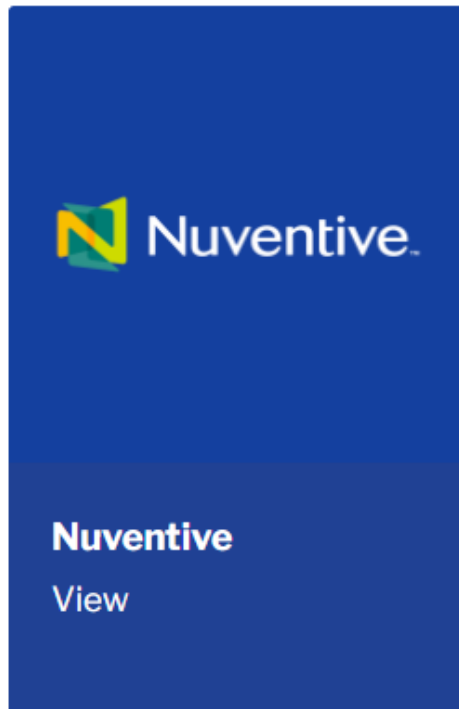
Nuventive Access

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

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

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

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

To access Nuventive:

- **Link to NEW Nuventive Improve**

Logging in

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

Select Your Office or Program Name

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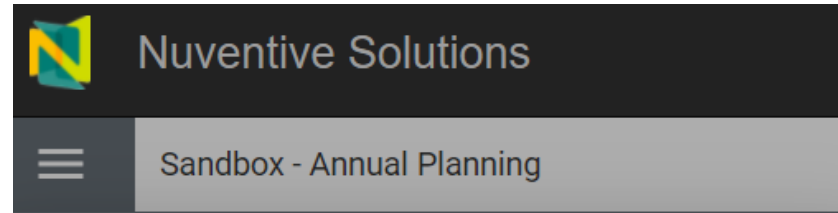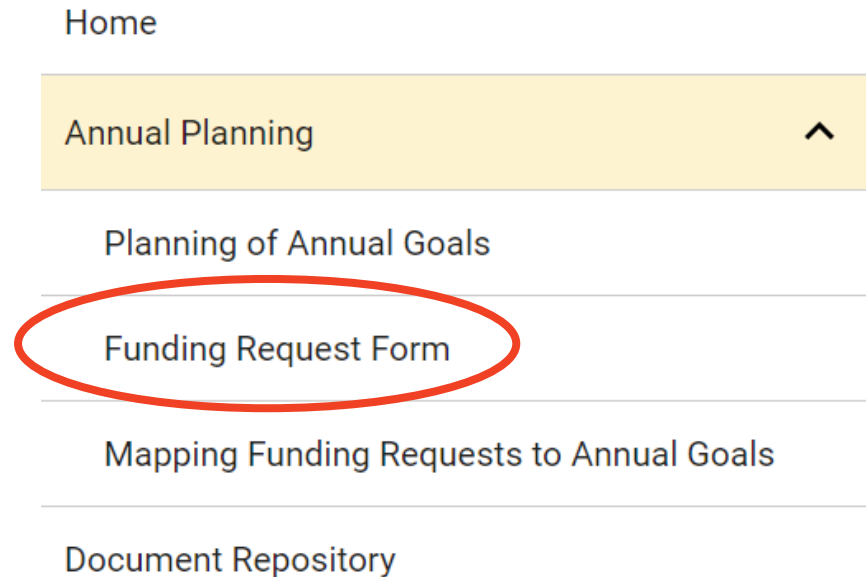
Resubmitting Funding Requests

Funding Request Form

Click on the hamburger to get to the Home screen.

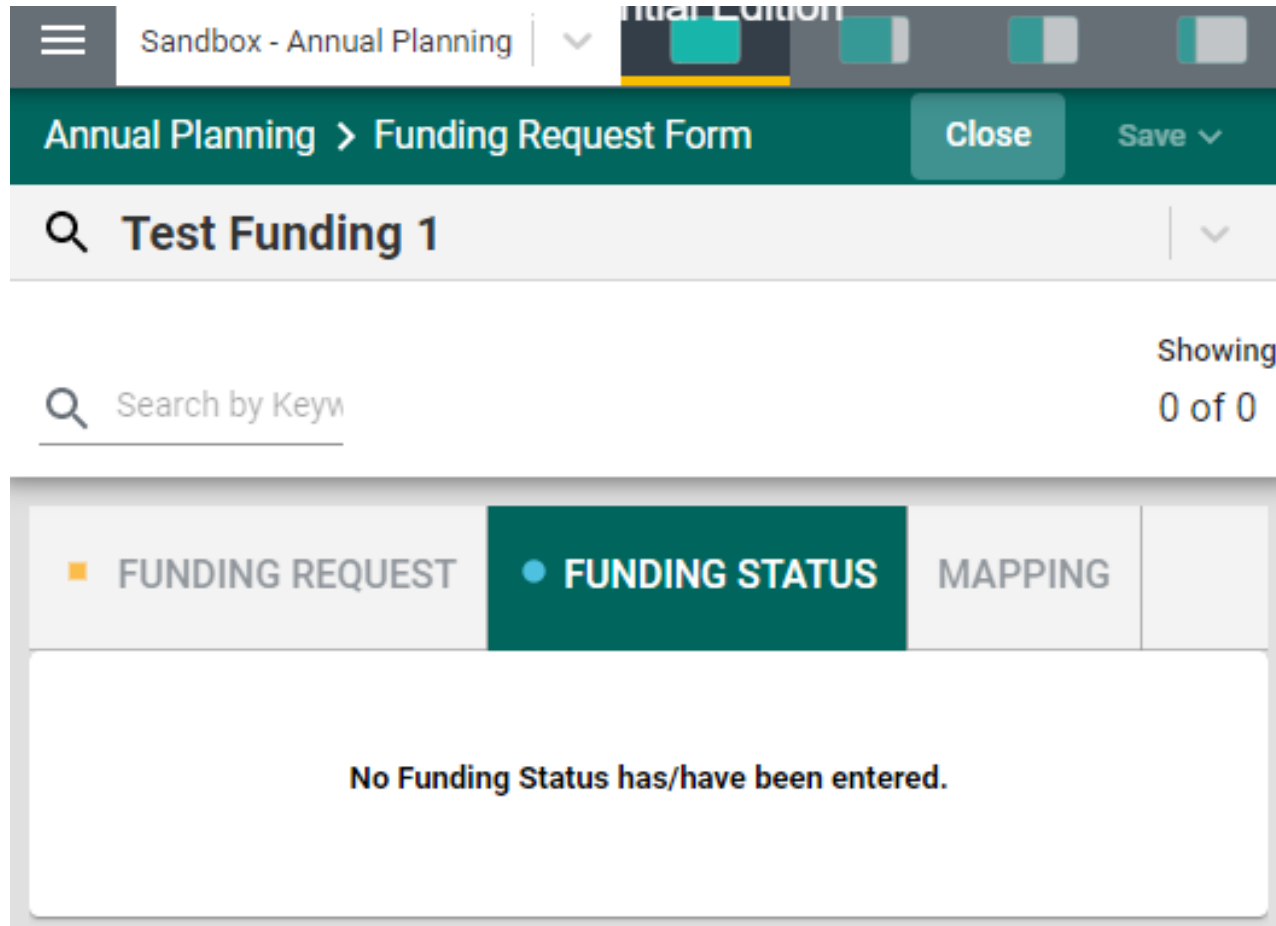Click on **Funding Request Form**

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 by funding request approved status is not yet available. In the future, this will allow you to filter funding request by approval status.

Determining Funding Approval Status

- If the funding request was approved for funding in 2022-23, the Funding Status tab will be populated with budget account information.

- If the Funding Status tab is blank, the funding request was not approved in 2022-23.

Resubmitting Funding Requests

To open an request that you would like to resubmit, click on the three dots and select open to edit the funding request form.

Resubmitting Funding Requests (planning year)

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

To resubmit a funding request :
- Add 2023-24 to the annual planning year field. Keep 2022-23.

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Resubmitting Funding Requests (Rationale)

In the rationale for the funding request, please clearly and succinctly articulate: ✕

* How will the funding request support the goals of the institution, area or division/program?

* What rationale for the funding request was provided in the last program review? If applicable, copy text from program review.

Rationale for funding request
Test Funding 1: Rationale

Does this funding request directly address a critical risk? ⓘ
No   ✕ | ⌄

If applicable, was this funding request mentioned or derived from the last program review? ⓘ
No   ✕ | ⌄

Amount Requested
60,000
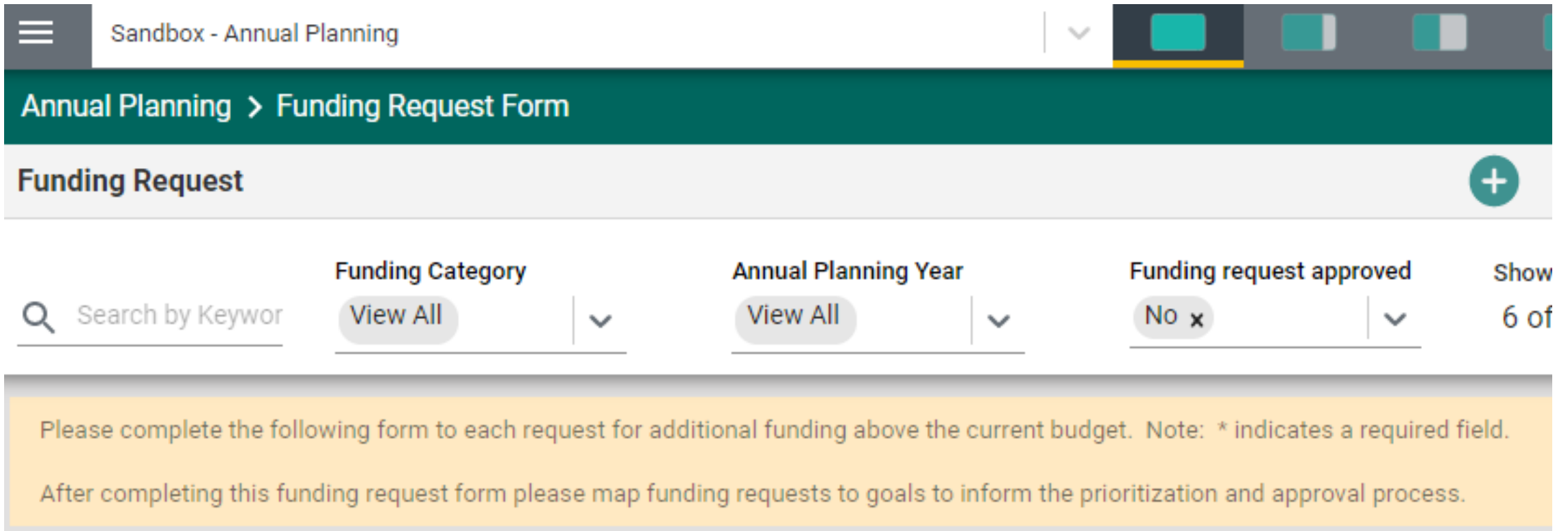
Be sure to provide a clear rationale for your funding request by including an explanation of how it supports the 2023-24 college goals. The college goals can be found in the Mapping tab.

Submitting New Requests

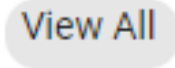# Entering New Funding Request
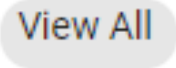
Click ➕ to add a new funding request
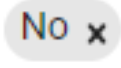
Category Descriptions

- A description will appear the first time you click in the white space under each category field.

- Click "x" to hide the description box.

Click ⓘ to access the description again.
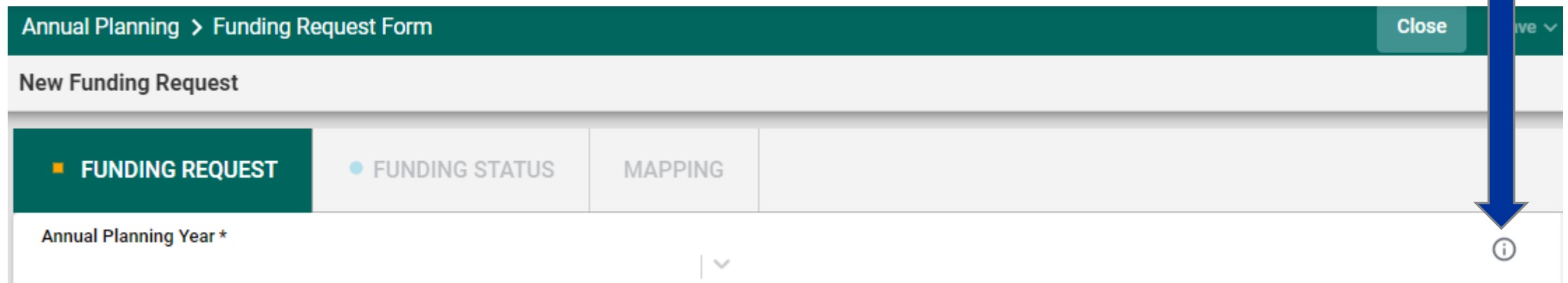
Required Fields

* Indicates a required field

Funding Request Form (Amount Requested)

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

REQUIRED FIELD FOR ONE-TIME OR ONGOING FUNDING REQUESTS: ☒
Please enter numbers only - no text.
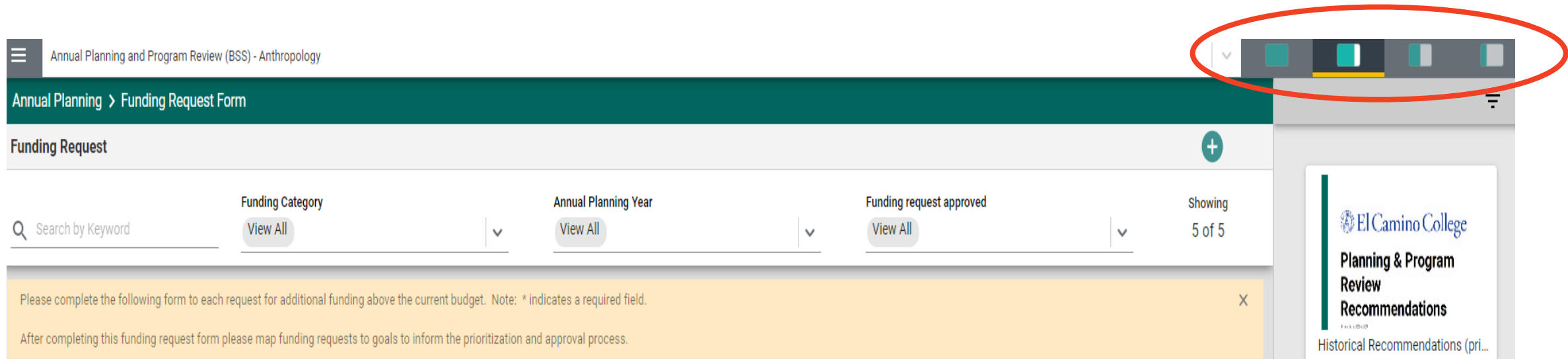For ongoing requests, please specify how much is needed for the budget augmentation.
For one-time requests that may last more than one year, please specify how much will be needed for each subsequent year in the rationale.

Amount requested for this annual planning year

65,000

For Academic Affairs & Student Services: Historical records from TracDat
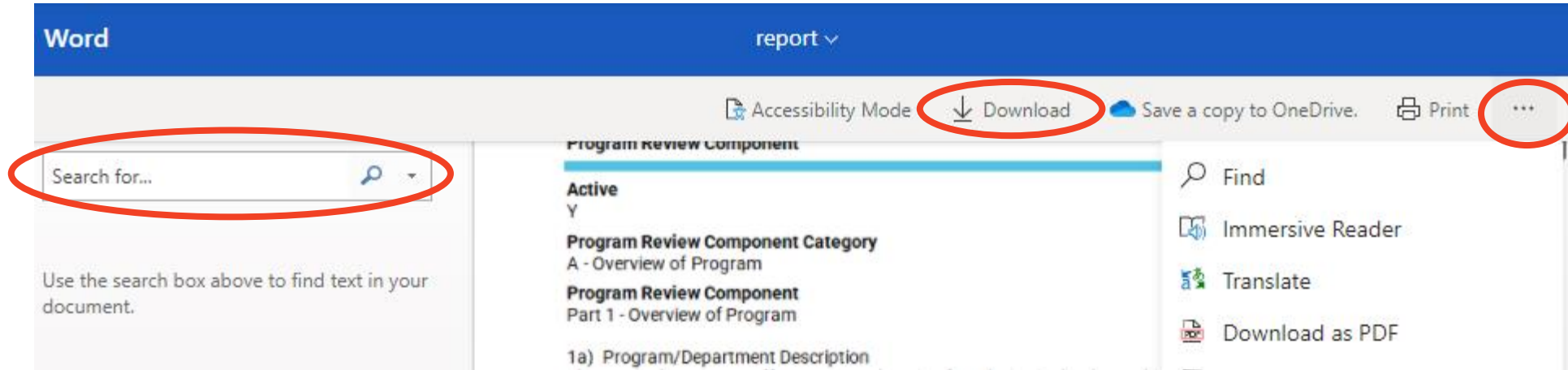
- All Funding Recommendations and Program Review recommendations from previous years are available as a PDF to the right of the "Funding Request Form"

- Click on viewing options to enlarge data/documents on the right side bar.

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.

Save your work

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

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Open a Funding Request

- Each saved funding request will show as a card in the Funding Request landing page.

- To view or edit a funding request, click ⋮ and select open.

Mapping of Funding Requests to College Goals

Mapping Funding Requests to Goals

Purpose of mapping: To use the 2023-24 College goals to provide context to the rationale for the funding request.

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

Mapping Form Access

One way to access the Mapping form is to click on "Mapping" within the Funding Request Form.
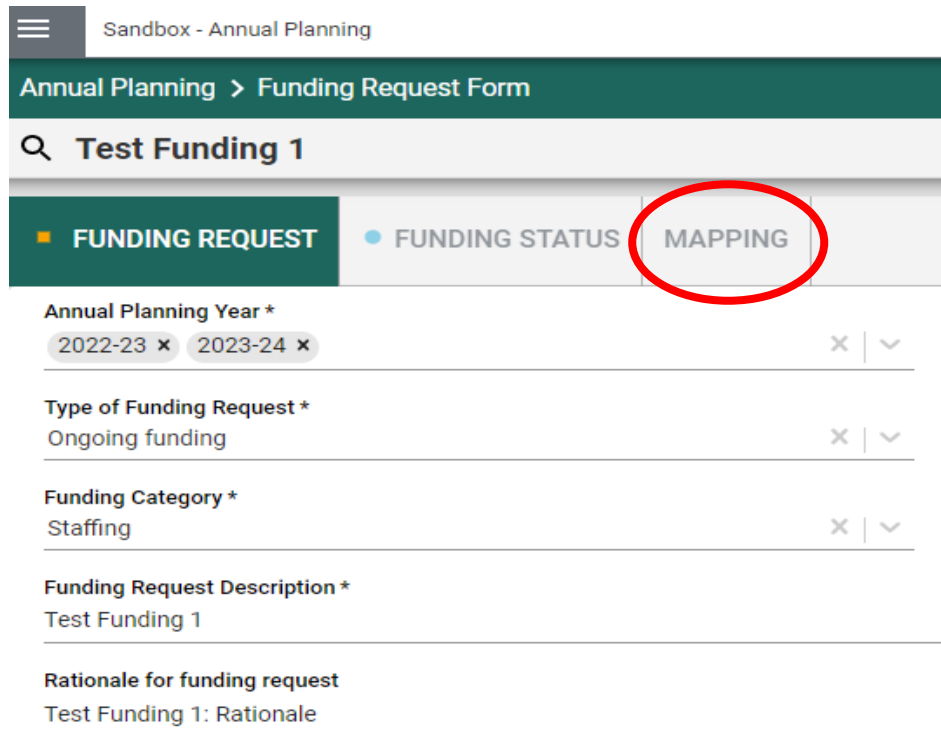
Another way to access the Mapping form is to click on Mapping Funding Requests to Annual Goals.
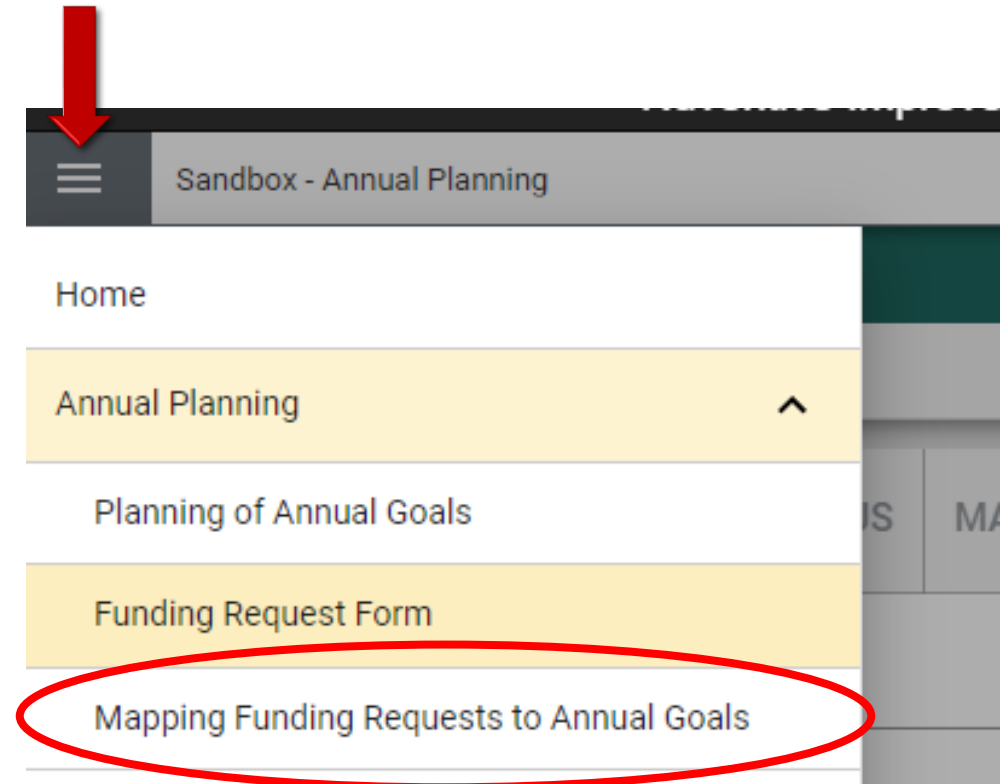
Mapping Funding Requests to Goals

Select 2023-24 College Goals from this dropdown box.
There will be five goals.

- Click in 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.

- **One funding request may be linked to more than one goal.**

Mapping Form: Ignore Add/Edit Note Feature

Please Do Not Use this Add/Edit Note feature

Next Steps

2023-24 Annual Planning & Budgeting Calendar

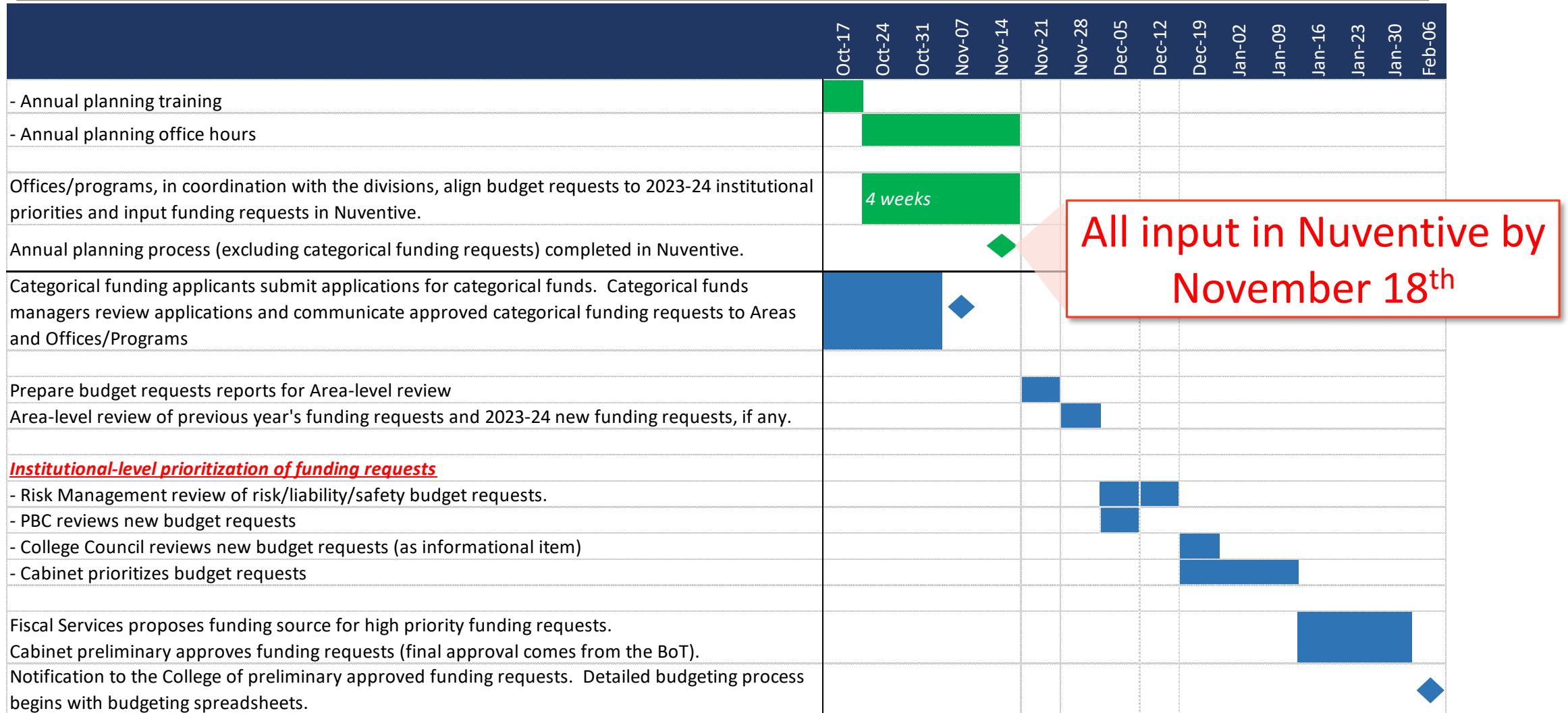|	Oct-17	Oct-24	Oct-31	Nov-07	Nov-14	Nov-21	Nov-28	Dec-05	Dec-12	Dec-19	Jan-02	Jan-09	Jan-16	Jan-23	Jan-30	Feb-06
- Annual planning training	■															
- Annual planning office hours		■	■	■												
Offices/programs, in coordination with the divisions, align budget requests to 2023-24 institutional priorities and input funding requests in Nuventive.		*4 weeks*														
Annual planning process (excluding categorical funding requests) completed in Nuventive.				◆												
Categorical funding applicants submit applications for categorical funds. Categorical funds managers review applications and communicate approved categorical funding requests to Areas and Offices/Programs	■	■ ◆														
Prepare budget requests reports for Area-level review						■										
Area-level review of previous year's funding requests and 2023-24 new funding requests, if any.							■									
Institutional-level prioritization of funding requests																
- Risk Management review of risk/liability/safety budget requests.								■	■							
- PBC reviews new budget requests								■								
- College Council reviews new budget requests (as informational item)										■						
- Cabinet prioritizes budget requests										■	■					
Fiscal Services proposes funding source for high priority funding requests. Cabinet preliminary approves funding requests (final approval comes from the BoT).														■	■	
Notification to the College of preliminary approved funding requests. Detailed budgeting process begins with budgeting spreadsheets.																◆

All input in Nuventive by November 18th

Annual Planning Resources

Annual Planning drop in **Office Hours**:

(every week until November 18ᵗʰ)

- Every Thursday, 3-5pm
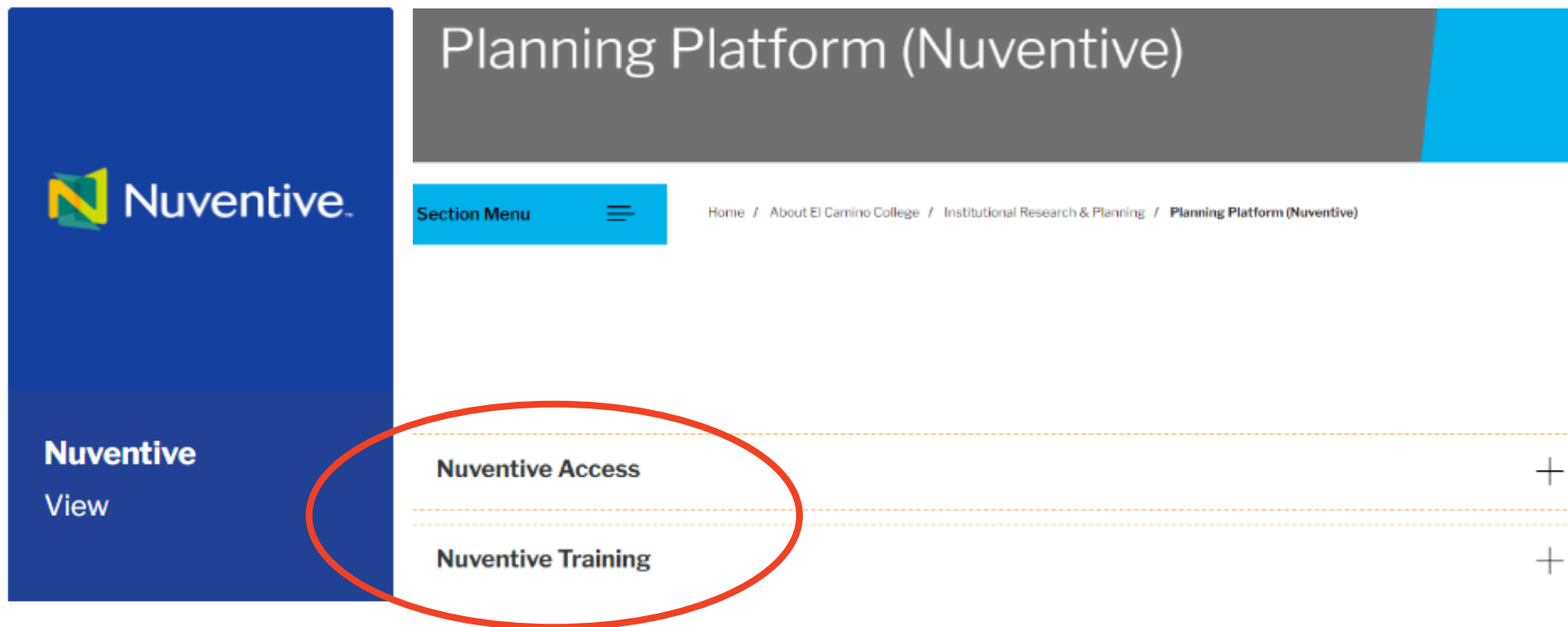
Zoom: https://elcamino-edu.zoom.us/j/83600114801

Zoom meeting ID: 836 0011 4801

(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?